

# AmeriCorps Program Director

## **Policies & Procedures**

### A Resource for State Program Directors

Updated September 2020



*The Governor's Commission  
on Service and Volunteerism*



**AmeriCorps**  
Idaho

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- Forms and documents related to the policies and procedures in this manual can be found on Basecamp for Program Directors.

# Introduction

## 1. Purpose of This Manual

The **Idaho AmeriCorps Program Director Policy and Procedure Manual** has been specifically designed as a guide for those who administer Idaho AmeriCorps programs. This manual assists in detailing the process for monitoring, supporting, and evaluating programs and, for working collaboratively to make the AmeriCorps programs in Idaho successful.

Please note that the information contained in this manual does not include all the legal requirements of an AmeriCorps grant. Program directors or individuals with particular questions should consult the [National and Community Service Act of 1990](#) (42 U.S.C. 12501 et seq.), the regulations issued under the Act ([45 CFR Sections 2520 – 2550](#)), the AmeriCorps [Grant Provisions](#) and [Grants Policy Guidance](#), and relevant state law and regulations. If there is a conflict between the content of this handbook and the AmeriCorps provisions, the provisions are the controlling authority.

### **The Idaho AmeriCorps Program Director Policy and Procedure Manual:**

- Provides a roadmap for AmeriCorps grantee/site management
- Lays out a typical administrator's general work load
- Illustrates legal requirements
- Shows where there is both control and flexibility to shape each AmeriCorps program

It is important that sub-grantees become familiar with all the information contained in this manual. **The Idaho AmeriCorps Program Director Policy and Procedure Manual** will be revised annually. An updated manual will be sent electronically to each Idaho AmeriCorps Program Director.

## 2. Laws, Regulations and Provisions

### **Laws**

National and Community Service Act of 1990, as amended

- (42 U.S.C. 12501, et seq.) – Chapter 129 (approx. 95 pages)

National and Community Service Trust Act of 1993

Serve America Act of 2009

<http://www.nationalservice.gov/about/legislation/edward-m-kennedy-serve-america-act>

### **Regulations**

- 45 CFR Parts 2500 – 2599     **Corporation for National and Community Service Chapter XXV.**

For the AmeriCorps Regulations, please visit:

[https://www.ecfr.gov/cgi-bin/text-](https://www.ecfr.gov/cgi-bin/text-idx?SID=3b90c999dab5ebb1b2bb1ef3bddb71b9&mc=true&tpl=/ecfrbrowse/Title45/45chapterXXV.tpl)

[idx?SID=3b90c999dab5ebb1b2bb1ef3bddb71b9&mc=true&tpl=/ecfrbrowse/Title45/45chapterXXV.tpl](https://www.ecfr.gov/cgi-bin/text-idx?SID=3b90c999dab5ebb1b2bb1ef3bddb71b9&mc=true&tpl=/ecfrbrowse/Title45/45chapterXXV.tpl)

### **Provisions**

For AmeriCorps Provisions, including revisions/changes, please visit:

<http://www.nationalservice.gov/build-your-capacity/grants/managing-ameri-corps-grants>

# **Serve Idaho Commission on Service and Volunteerism**

## **1. A Brief History of National Service**

When faced with challenges, our nation has always relied on the dedication and action of its citizens. AmeriCorps carries on a long tradition of citizen involvement by providing opportunities for Americans of all ages to improve their communities through service.

### **Revival of Interest in National and Community Service**

President George H. W. Bush helped spark a revival of interest in national service when he instituted the White House Office of National Service in 1989. In 1990 Congress passed the National and Community Service Act, which created a Commission on National and Community Service whose mission was to “renew the ethic of civic responsibility in the United States.” Full implementation began in 1992, when the commission awarded \$64 million in grants to support four broad types of state and local community service efforts. These initiatives were Serve-America which involved school-aged youth in community service and service-learning through a variety of school and community-based activities; Higher Education Innovative Projects aimed at involving college students in community service and promoting community service at educational institutions; American Conservation and Youth Service Corps, supporting summer and year-round youth corps initiatives that engage both in- and out-of-school youth in community service work; and the National and Community Service Demonstration Models, for programs that were potential models for large-scale national service. The National Civilian Community Corps (NCCC), a demonstration program to explore the possibility of using post-Cold War military resources to help solve problems here at home, was enacted later as part of the 1993 Defense Authorization Act. It is a residential service program modeled on the Depression-era Civilian Conservation Corps and the United States military.

### **National and Community Service Trust Act**

President Bill Clinton sponsored the National and Community Service Trust Act, a revision of the National and Community Service Act of 1990, which was passed by a bipartisan coalition of members of Congress and signed into law on September 21, 1993. The legislation created a new federal agency, the Corporation for National and Community Service (CNCS), to administer federally-funded national service programs. The program was renamed AmeriCorps in September 2020. The law created AmeriCorps, designed to support local, state, and national organizations across the nation, and involve Americans in results-driven community service. Individual AmeriCorps participants, known as members, serve for a year, during which they receive a living allowance. After service, members receive an education award, administered by the National Service Trust, and paid as a voucher redeemable for current education costs at colleges, universities, other post-secondary institutions, and approved school-to-work programs, or to pay back existing qualified student loans. The legislation drew on the principles of both the Civilian Conservation Corps and the GI Bill, encouraging Americans to serve and rewarding those who do. The new agency also took over management of the programs of two previous agencies, ACTION, which was responsible for running VISTA and the National Senior Service Corps programs, and the more recent Commission on National and Community Service, including the NCCC, forming a new network of national service programs.

## **Service in the New Millennium**

In his State of the Union address on January 29, 2002, President George W. Bush called on all Americans to serve their country for the equivalent of two years and announced the creation of the USA Freedom Corps, an umbrella network for volunteerism. A coordinating council housed at the White House and chaired by the President worked to expand and strengthen federal service programs like the Peace Corps, Citizen Corps, AmeriCorps, Senior Corps and Learn and Serve America, and to raise awareness of and break down barriers to service opportunities within all federal government agencies. Several bills have been introduced in Congress to increase funding for national service and to reauthorize the National and Community Service Act.

On April 21, 2009, President Barack Obama signed the **Edward M. Kennedy Serve America Act** <http://www.nationalservice.gov/about/legislation/edward-m-kennedy-serve-america-act>. The Serve America Act reauthorizes and expands national service programs administered by the Corporation for National and Community Service, a federal agency created in 1993. The Corporation engages four million Americans in result-driven service each year, including AmeriCorps members, Senior Corps volunteers, and millions of additional community volunteers mobilized and managed through the agency's programs. The Serve America Act reauthorizes and expands the mission of the Corporation for National and Community Service, by: increasing opportunities for Americans of all ages to serve, supporting innovation and strengthening the nonprofit sector, strengthening management, cost-effectiveness, and accountability within said entities.

## **2. AmeriCorps**

In 1993, the Corporation for National and Community Service was established and was renamed AmeriCorps in 2020. AmeriCorps was created to connect Americans of all ages and backgrounds with opportunities to give back to their communities and their nation. It merged the work and staffs of two predecessor agencies, ACTION and the Commission on National and Community Service. AmeriCorps empowers and supports Americans to tackle persistent challenges such as helping youth succeed in school, securing safe affordable housing for economically disadvantaged families, or helping communities respond to disasters. Through this work, AmeriCorps achieves its mission of improving lives, strengthening communities and fortifying the civic health of our nation.

AmeriCorps 2011 -2015 [Strategic Plan](#) (PDF) leverages the strength of grantees, participants, programs, state service commissions and the American public to build a network of programs that offer effective solutions in the six priority areas:

1. Disaster Services
2. Economic Opportunity
3. Education
4. Environmental Stewardship
5. Healthy Futures
6. Veterans and Military Families

They will produce these results by investing in effective local initiatives, engaging more Americans in service, supporting evidence-based programs, and leveraging public-private partnerships.

### 3. AmeriCorps Programs

**AmeriCorps Seniors:** AmeriCorps Seniors offers a network of programs that tap the rich experience, skills and talents of older citizens to meet community challenges.

**AmeriCorps:** Through its programs, AmeriCorps provides opportunities for Americans to make an ongoing, intensive commitment to service.

- **AmeriCorps State and National:** AmeriCorps\*State and National offers grants that support a broad range of local service programs that engage thousands of Americans in intensive service to meet critical community needs. AmeriCorps\*State and National also administers grants for Indian tribes and U.S. territories, who are eligible for funding that is set aside to address critical needs within their communities. *Serve Idaho administers AmeriCorps State grants in Idaho.*
- **AmeriCorps VISTA:** AmeriCorps\*VISTA provides full-time members to community organizations and public agencies to create and expand programs that build capacity and ultimately bring low-income individuals and communities out of poverty.
- **AmeriCorps NCCC:** The AmeriCorps\*National Civilian Community Corps is a full-time residential program for men and women aged 18-24 that strengthens communities while developing leaders through direct, team-based national and community service.

**AmeriCorps Volunteer Generation Fund:** The Volunteer Generation Fund, a new program authorized by the Edward M. Kennedy Serve America Act, is designed to increase the number of people who serve in meaningful roles as volunteers dedicated to addressing important needs in communities across America.

**Special Initiatives:** AmeriCorps supports a variety of special initiatives and innovation grants.

- United We Serve / Serve.gov
- 9/11 Day of Service and Remembrance
- Martin Luther King, Jr. Day of Service
- National Service Day of Recognition
- 

### 4. Serve Idaho Mission

**"TO INSPIRE AND RECOGNIZE VOLUNTEERS AND EMPOWER COMMUNITIES THROUGH SERVICE AND AMERICORPS TO SOLVE IDAHO'S UNMET NEEDS."**

To achieve this mission Serve Idaho promotes collaborative efforts among private and nonprofit organizations, schools and state and local government agencies to advance national service programs and volunteerism throughout the state. [www.serveidaho.gov](http://www.serveidaho.gov).

**Serve Idaho meets its mission through:**

- Administration of Idaho's AmeriCorps grants to address critical community needs through a year of dedicated service.
- Leadership of Idaho's promise to ensure young people have the resources they need to be successful.
- Hosting the annual Serve Idaho Conference on Service and Volunteerism to provide volunteer management and professional development training for national service members, volunteer administrators representing the public and private sectors, service-learning educators and community volunteers.
- Partnership with the Idaho Nonprofit Center's Idaho Philanthropy Days to recognize Idaho's outstanding volunteers.
- Leadership in national days of service including Martin Luther King Jr. Day, AmeriCorps Week and September 11th Day of Service and Remembrance.

**5. History**

Serve Idaho, The Governor's Commission on Service and Volunteerism, was established through Executive Order by Governor Cecil D. Andrus in 1994 as a result of the National and Community Service Trust Act of 1993 and the creation of AmeriCorps.

The commission was established to advise and assist in the development and implementation of a comprehensive, statewide plan for promoting volunteer involvement and citizen participation in Idaho, as well as to serve as the state's liaison to national, state and community organizations which support the intent of the National and Community Service Trust Act.

Serve Idaho was formerly known as the Idaho Commission for National and Community Service. In 1994, the Serve Idaho Commission trained and gave the AmeriCorps pledge to its first class of 23 AmeriCorps members. The AmeriCorps members served in the Idaho TRiO AmeriCorps Program through Lewis-Clark State College and the Idaho State Parks in Education AmeriCorps Program through the Idaho Department of Parks and Recreation.

Serve Idaho has been housed with the Idaho State Board of Education and the Idaho Department of Correction. The commission joined the Idaho Department of Labor in July 2009. The Department of Labor serves as the host agency for the administration of the Serve Idaho Commission.

The Edward M. Kennedy Serve America Act, reauthorizing AmeriCorps, was passed in 2009 laying the groundwork for significant expansion of AmeriCorps and civic engagement activities nationwide. Serve Idaho is funded by grants from AmeriCorps and through cash and in-kind donations from state and local partners. The Department of Labor provides generous matching funds and other administrative support to the commission. Serve Idaho does not receive general funds from the state.

AmeriCorps provides federal funding for service-related programs and initiatives including AmeriCorps\*State and National Grants program, AmeriCorps\*VISTA, and Senior Service Corps. All of these programs strive to engage Americans of all ages and backgrounds in community-based service to address unmet critical needs in communities throughout the United States.



## 6. Collaboration

Collaboration is an intentional relationship between two or more individuals or organizations that come together to communicate, cooperate, and coordinate for the purpose of achieving common goals. These goals create shared values that enhance sustainable communities and citizen involvement.

The promotion of collaboration between the National Service Programs is a first priority in the process of creating support networks on both local and statewide levels. It is important that members and staff of the Serve Idaho Commission, and members and staff of the national service program projects collaborate.

**Expectations for Collaboration: AmeriCorps State programs will partner with other National Service members during AmeriCorps week and other national days of service [such](#) as MLK Day. AmeriCorps State programs will invite and include other national service programs (VISTA, AmeriCorps National, and AmeriCorps Seniors) to trainings or conferences, as appropriate.**

# AmeriCorps Program Requirements

## **45 CFR Section 2522.100 Minimum Requirements that Every AmeriCorps Program, Regardless of Type, Must Meet**

Although a wide range of programs may be eligible to apply for and receive support AmeriCorps, all AmeriCorps subtitle C programs must meet certain minimum program requirements. These requirements apply regardless of whether a program is supported directly by AmeriCorps or through a sub-grant issued by Serve Idaho. All AmeriCorps programs must:

- (a) Address educational, public safety, human, or environmental needs, and provide a direct and demonstrable benefit that is valued by the community in which the service is performed;
- (b) Perform projects that are designed, implemented, and evaluated with extensive and broad-based local input, including consultation with representatives from the community served, participants (or potential participants) in the program, community-based agencies with a demonstrated record of experience in providing services, and local labor organizations representing employees of project sponsors (if such entities exist in the area to be served by the program);
- (c) Obtain, in the case of a program that also proposes to serve as the project sponsor, the written concurrence of any local labor organization representing employees of the project sponsor who are engaged in the same or substantially similar work as that proposed to be carried out by the AmeriCorps participant;
- (d) Establish and provide outcome objectives, including a strategy for achieving these objectives, upon which self-assessment and AmeriCorps-assessment of progress can rest. Such assessment will be used to help determine the extent to which the program has had a positive impact:
  - (1) On communities and persons served by the projects performed by the program;
  - (2) On participants who take part in the projects; and
  - (3) In such other areas as the program or AmeriCorps may specify;
- (e) Strengthen communities and encourage mutual respect and cooperation among citizens of different races, ethnicities, socioeconomic backgrounds, educational levels, both men and women and individuals with disabilities;
- (f) Agree to seek actively to include participants and staff from the communities in which projects are conducted, and agree to seek program staff and participants of different races and ethnicities, socioeconomic backgrounds, educational levels, and genders as well as individuals with disabilities unless a program design requires emphasizing the recruitment of staff and participants who share a specific characteristic or background. In no case may a program violate the nondiscrimination, non-duplication and non-displacement rules governing participant selection described in part 2540 of this chapter. In addition, programs are encouraged to establish, if consistent with the purposes of the program, an intergenerational component that combines students, out-of-school youths, and older adults as participants;

(g)(1) Determine the projects in which participants will serve and establish minimum qualifications that individuals must meet to be eligible to participate in the program; these qualifications may vary based on the specific tasks to be performed by participants. Regardless of the educational level or background of participants sought, programs are encouraged to select individuals who possess leadership potential and a commitment to the goals of the AmeriCorps program. In any case, programs must select participants in a non-partisan, non-political, non-discriminatory manner, ensuring fair access to participation. In addition, programs are required to ensure that they do not displace any existing paid employees as provided in part 2540 of this chapter;

(2) In addition, all programs are required to comply with any pre-service orientation or training period requirements established by AmeriCorps to assist in the selection of motivated participants. Finally, all programs must agree to select a percentage (to be determined by AmeriCorps) of the participants for the program from among prospective participants recruited by AmeriCorps State Commissions under part 2533 of this chapter. AmeriCorps may also specify a minimum percentage of participants to be selected from the national leadership pool established under §2522.210(c). AmeriCorps may vary either percentage for different types of AmeriCorps programs;

(h) Provide reasonable accommodation, including auxiliary aids and services (as defined in section 3(1) of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102(1)) based on the individualized need of a participant who is a qualified individual with a disability (as defined in section 101(8) of such Act (42 U.S.C. 12111(8))). For the purpose of complying with this provision, AmeriCorps programs may apply for additional financial assistance from AmeriCorps pursuant to §2524.40 of this chapter;

(i) Use service experiences to help participants achieve the skills and education needed for productive, active citizenship, including the provision, if appropriate, of structured opportunities for participants to reflect on their service experiences. In addition, all programs must encourage every participant who is eligible to register to vote prior to completing a term of service;

(j) Provide participants in the program with the training, skills, and knowledge necessary to perform the tasks required in their respective projects, including, if appropriate, specific training in a particular field and background information on the community, including why the service projects are needed;

(k) Provide support services—

(1) To participants who are completing a term of service and making the transition to other educational and career opportunities; and

(2) To those participants who are school dropouts in order to assist them in earning the equivalent of a high school diploma;

(l) Ensure that participants serving in approved AmeriCorps positions receive the living allowance and other benefits described in §§2522.240 through 2522.250 of this chapter.

(m) Describe the manner in which the AmeriCorps educational awards will be apportioned among individuals serving in the program. If a program proposes to provide such benefits to less than 100 percent of the participants in the program, the program must provide a compelling rationale for determining which participants will receive the benefits and which participants will not. AmeriCorps programs are strongly encouraged to offer alternative post-service benefits to participants who will not receive AmeriCorps educational awards, however AmeriCorps grant funds may not be used to provide such benefits;

(n) Agree to identify the program, through the use of logos, common application materials, and other means (to be specified by the AmeriCorps), as part of a larger national effort and to participate in other activities such as common opening ceremonies (including the administration of a national oath or affirmation), service days, and conferences designed to promote a national identity for all AmeriCorps programs and participants, including those participants not receiving AmeriCorps educational awards. This provision does not preclude an AmeriCorps program from continuing to use its own name as the primary identification, or from using its name, logo, or other identifying materials on uniforms or other items;

(o) Agree to begin terms of service at such times as AmeriCorps may reasonably require and to comply with any restrictions AmeriCorps may establish as to when the program may take to fill an approved AmeriCorps position left vacant due to attrition;

(p) Comply with all evaluation procedures specified by AmeriCorps, as explained in §§2522.500 through 2522.560;

(q) In the case of a program receiving funding directly from AmeriCorps, meet and consult with the State Commission for the State in which the program operates, if possible, and submit a copy of the program application to the State Commission; and

(r) Address any other requirements as specified by AmeriCorps.

Per the current AmeriCorps State and National Grant Provisions, the website of all subgrantee organizations must clearly state that they are an AmeriCorps program and display the AmeriCorps logo with prominence. Additionally, all locations where members serve should post a list of prohibited activities. Serve Idaho has developed a prohibited activity poster that can be distributed to programs in printed form or electronically.

## **Marketing and Outreach**

Effective marketing helps programs recruit volunteers, secure partnerships, and raise money. When developing a plan, start with a mission statement, and then consider product, promotion, and tactics. Communicating effectively with the media helps programs reach potential participants and funding sources, educate the public, and promote program activities.

Every year, thousands of stories about AmeriCorps Seniors, and AmeriCorps appear in the media – almost all generated by local project staff and volunteers. Publicizing your program is not a goal in itself. It is a means of building support for your program and increasing your likelihood of success. Taking the time to communicate with the public helps attract resources from your community, including volunteers, sponsors, and funding, and helps educate people about your program. You don't have to be a media pro to get good coverage, but having some tips and resources can help <http://www.nationalservice.gov/newsroom/marketing>.

## **Presentations and Published Material**

When marketing your AmeriCorps program it must be acknowledged that it is funded in part by Serve Idaho and AmeriCorps.

## **Publications Required Verbiage**

Publications created by members or grant-funded staff are consistent with the purposes of the grant. The AmeriCorps logo is included on such documents. The program assures that the following acknowledgment and disclaimer appears in any external report or publication of material based upon work supported by this grant. “This material is based upon work supported by AmeriCorps under AmeriCorps Grant No. Opinions or points of view expressed in this document are those of the authors and do not necessarily reflect the official position of, or a position that is endorsed by, AmeriCorps or the AmeriCorps program.”

## **Photographs:**

Each subgrantee is expected to take several high quality digital pictures of AmeriCorps members “in action” wearing their AmeriCorps gear. These photos should reflect the diversity of service in Idaho as well as of our members. Programs are expected to send any quality photos along with stories or captions that describe the activity to Serve Idaho to share and highlight member achievements on a regular basis through social media and with AmeriCorps, or in publications. Some of the opportunities for programs to share their photos with Serve Idaho can be with progress reports, or when members or programs are featured in local news.

### **1. Member Informed Consent**

During the enrollment of members, programs need to obtain member informed consents to ensure they are aware of this expectation. Members will agree to the use of their photo and/or voice recording by signing their member service agreement, or in some cases, programs may elect to have members sign a separate consent form.

### **2. Client Informed Consent**

Some of the best action photos of members are those in which members are performing service with their clients or students. Programs are advised to receive consent from individuals who appear in photos or videos. Programs should keep the completed forms on file when taking and sending photos to Serve Idaho.

## **Program Dates**

### **1. Federal Financial Report Due Dates 2020-2021**

#### ***1<sup>st</sup> report: April 22, 2021***

For expenses incurred from the start of the Program in 2020 – March 31, 2021.

#### ***Final Report: October 20, 2021***

For expenses incurred from April 1, 2021- End of program (July or August depending on program end date), 2021.

## 2. AmeriCorps Progress Reports (GPR) 2020-2021

Please provide cumulative data from the start of the program year to the end date indicated for each reporting period below.

### *4<sup>th</sup> quarter October 7, 2020 for 2019-2020 grant year*

Cumulative report for the period ending August 31, 2019 (all programs)

### *1<sup>st</sup> quarter January 6, 2021*

For the period ending December 31, 2020 (only high risk and new programs)

### *2<sup>nd</sup> quarter April 7, 2021*

For the period ending March 31, 2021 (all programs)

### *3<sup>rd</sup> quarter July 7, 2021*

For the period ending June 30, 2021 (only high risk and new programs)

### *4<sup>th</sup> quarter October 6, 2021 (all programs)*

Cumulative report for the period ending August 31, 2021

## Reporting Expectations and Requirements

The subgrantee is required to comply with all reporting requirements as outlined above as well as any modifications to the reporting requirements and/or deadlines requested by Serve Idaho. In the event the subgrantee is not able to meet the stated deadline in a timely manner for reasons legitimately beyond the control of the subgrantee, an extension will be considered only if Serve Idaho receives a **written request** explaining the need for an extension **PRIOR** to the deadline. A subgrantee should not assume approval has been authorized by Serve Idaho until it receives written confirmation.

Note: The report due dates stated in the current AmeriCorps State and National Grant Provisions are set by AmeriCorps and apply to State Commissions not its subgrantees.

## 3. Tentative Program Director Meetings

Thursday, November 12, 2020

Wednesday, January 27, 2021

Wednesday, May 5, 2021

July, 2021 (exact date TBD, likely the week of July 12, 2021)

The Program Director meetings are mandatory. If the program director cannot attend, they should send a representative in their place. If the program director or a staff member from the AmeriCorps program is unable to attend please contact the project coordinator at 208-332-3578 extension 3930. Failure to attend the Program Director Meetings or send a representative will impact a program's overall risk assessment standing.

Program Directors failing to provide 24 hour notice of their inability to attend a Program Directors Meeting will be charged for costs associated with the meeting. This will include the costs of food, breaks and hotel.

## **Program Director Travel Policy**

Serve Idaho coordinates travel arrangements with the program directors to and from the quarterly program director meetings. Serve Idaho pays directly for lodging, flight and rental car, but reimburses programs for per diem and mileage for the use of personal vehicles.

Do not claim travel expenses to and from the program directors meeting on your PER (Periodic Expense Report).

Many program directors opt to pair site visits to the Boise area with their attendance at the mandatory, quarterly, Program Directors Meetings. When traveling to visit a program extends a Program Director's stay (either prior to or after the meeting), the program will be required to arrange for and pay for their entire travel, including travel to the quarterly program directors meetings. Additional expenses incurred as a result of the program conducting business before or after the Program Directors Meetings are not covered by Serve Idaho, but are the responsibility of the program. Serve Idaho will reimburse programs for lodging, flight, rental car, per diem and mileage as it relates only to required travel time to and from the program directors meetings and the day of the program directors meetings.

If the program is a new or high risk program, Serve Idaho may request that more than one program staff attend the Program Director Meetings. Unless that program staff member is extending travel, Serve Idaho will coordinate and pay for their lodging and flight as well as reimburse for per diem and mileage. In the event the required additional staff member extends their stay, the program will be required to arrange for and pay for their entire travel and Serve Idaho will reimburse for lodging, flight, rental car, per diem and mileage as it relates only to required travel time to and from the program directors meetings and the day of the program directors meetings. In the event that Serve Idaho has requested more than one program staff to attend, and program staff are traveling via vehicle, Serve Idaho will reimburse travel expenses for one vehicle. Any additional vehicle expenses must be covered by the program.

With permission from Serve Idaho, programs are allowed to bring additional staff members to the quarterly program directors meetings. Additional expenses incurred as a result of a program bringing an additional staff member are not covered by Serve Idaho, but are the responsibility of the program. Programs have 30 days from the last day of travel to submit their reimbursement forms to Serve Idaho's Administrative Assistant. If a program fails to submit their travel reimbursement request within the 30 day window, the program may not be reimbursed for these expenses.

### **Extended Travel Procedure:**

For those program staff members extending their travel, Serve Idaho will require the following documentation:

#### **Lodging:**

1. A lodging receipt with the cost broken up by day.
  - a. A receipt of lodging should include the last four digits of the card used for payment.

#### **Flight:**

1. A screen shot or printed copy of the cost for normal travel to the program directors meeting.
  - a. (For example, if the meeting is on the first of the month, you would run through your preferred travel site the cost of travel from the 31<sup>st</sup> of the previous month through the 1<sup>st</sup> or 2<sup>nd</sup> of the month.)
  - b. The lowest and most reasonable cost will determine your reimbursement.

- c. This travel comparison should be run at the same time when booking official travel, preferably at least two weeks prior to the program director meeting.
2. A receipt of your flight with the last four digits of the card used for payment.
3. Receipts of any baggage. Baggage fees charged by commercial airlines are allowable and not to exceed one checked bag and one carry-on bag per departure unless additional baggage costs are necessary and approved in advance.
  - a. A receipt of baggage should include the last four digits of the card used for payment.

**Rental Car:**

1. A receipt of your rental car with the last four digits of the card used for payment.

**Other:**

1. Any other receipts, such as Taxi or ride sharing service receipts, can also be submitted for reimbursement.
  - a. The last four digits of the card used for payment should also be present.
  - b. Tips and gratuity are included in the per diem allowance and cannot be claimed separately.
2. Serve Idaho will calculate your per diem and mileage, no additional documentation is necessary.

## **4. Site Visit Dates**

The need for in-person site visits will be determined by program risk assessments that are completed in Fall 2020. Serve Idaho will notify each program about their site visit plan after these risk assessments are complete.

## **5. Member Training Dates**

Due to COVID-19, the Fall Member Training will occur virtually on the following dates:

- October 22, 2020 from 1:00pm-5:00pm MST
- October 23, 2020 from 9:00am-1:00pm MST
- October 24, 2020 from 8:00am-Noon MST
- October 26, 2020 from 1:00pm-5:00pm MST

Spring Training Dates:

TBD

## **6. Miscellaneous Dates**

The Serve Idaho Conference due to COVID-19 will be held virtually on February 23<sup>rd</sup> and 24<sup>th</sup>, 2021.

The Serve Idaho Conference is mandatory for full-time, three-quarter-time and half-time AmeriCorps members and program staff. If a member is unable to attend, the program will need to provide an avenue for them to receive the pertinent training.

## **7. National Days of Service**

Idaho AmeriCorps State programs are required to participate in two national days of service. One is to include Martin Luther King Jr. Day and one day of service of their choice. Those programs who do not operate in January can select two days of service of their choice.



National Service members or program staff members planning events for National Days of Service should complete [this Overview Reporting Form](#) before the event. After the event, National Service members should fill out [this Event Recap Form](#). For a list of national days of service please see below:

**AmeriCorps Recognized National Days of Service:**

**September 11<sup>th</sup> National Day of Service and Remembrance**

*September 11, 2021—I Remember. I Serve.*

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Tomorrow Together encourages people everywhere to set aside time every September 11 to help others in need - in any fashion they deem appropriate - in honor of those who lost their lives as a result of the terrorist attacks against America. Partners are Points of Light, and Corporation for National and Community Service.

<http://www.911day.org/> ; <https://www.nationalservice.gov/serve/september-11th-national-day-service-and-remembrance>

**Martin Luther King, Jr. Day**

*January 18, 2021—Make it a day ON...Not a day OFF!*

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Martin Luther King, Jr. day is to help keep Dr. King's legacy of service to others alive in communities across the country. Sponsors are AmeriCorps and the Points of Light & Hands On Network.

For more information visit <http://www.nationalservice.gov/MLKDay>.

**AmeriCorps Week**

*March 7-13, 2021 – Celebrate AmeriCorps!*

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AmeriCorps Week is a recruitment and recognition event designed to bring more Americans into service, salute AmeriCorps members and alums for their powerful impact, and thank the community partners who make AmeriCorps possible. AmeriCorps Week provides an opportunity for AmeriCorps members, alums, grantees, program partners, and friends to shine a spotlight on the work done by members in communities across the country -- and to motivate more individuals to join AmeriCorps or volunteer in their communities.

**Other National Days of Service:**

**Idaho@Play:**

**First week of June – Lets play outside!**

With the help of AmeriCorps members, Idaho@Play is a call for all kids and adults alike to get moving and play outside across all of beautiful Idaho.

**Make a Difference Day**

*October 24, 2020—National Day to Help Others!*

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Make a Difference Day is to inspire and reward volunteers. Everyone who helps others on this day and submits an entry form is eligible for a national or local award and for a cash donation to a charitable cause. Every award recipient will appear in USA WEEKEND Magazine and on [makeadifferenceday.com](http://makeadifferenceday.com). Sponsors are USA WEEKEND Magazine and the Points of Light Hands On Network.

**Family Volunteer Day**

*November 23, 2020— Be an Incredible Family—Volunteer!*

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Family Volunteer Day is to call families across America to work together in volunteer service to strengthen their families, communities, local businesses, and non-profit organizations. A program of Points of Light & Hands On Network, sponsored by Walt Disney Company.

For more information visit: <http://www.pointsoflight.org/signature-events/family-volunteer-day>

**National Volunteer Week**

*April 18-24, 2021 – Inspire By Example!*

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National Volunteer Week is to recognize and celebrate the efforts of volunteers at the local, state and national levels. The sponsor is the Points of Light & Hands On Network.

**For more information, contact: 1-800- VOLUNTEER or visit:**

<http://www.pointsoflight.org/signature-events/national-volunteer-week>

**Global Youth Service Day (GYSD)**

*April 23-25, 2021 — The power of youth serving youth!*

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Global Youth Service Day is to empower young people, highlighting their ongoing contributions to their communities and mobilizing their energy, commitment, and idealism through sustainable service. Sponsors are Youth Service America, National Youth Leadership Council, Parade Magazine, and 49 national partner organizations including the Points of Light & Hands On Network and 13 sponsors including AT&T.

For more information visit [www.YSA.org/GYSD](http://www.YSA.org/GYSD).

**Join Hands Day**

*May 1, 2021 —Youths and Adults Volunteering Together!*

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Join Hands Day is a day that brings youths and adults together to improve their own communities. Sponsors are America's Fraternal Benefit Societies.

# Member Management

## 1. Recruitment

### Local recruitment and selection

As an AmeriCorps program, you must actively seek to recruit program members from the community in which the project is conducted. Members of diverse races and ethnicities, socioeconomic backgrounds, education levels, both men and women, and individuals with disabilities, unless and to the extent that the approved program design requires emphasizing the recruitment of staff and members who share a specific characteristic or background. However, in no case may you violate the nondiscrimination and non-displacement rules governing participant selection.

### My AmeriCorps - Your Online AmeriCorps Recruitment System

To assist you in reaching a national pool of potential members, you must list your program opportunities online. You will access the recruitment system through eGrants. If you are new to AmeriCorps, you will need to register to get an eGrants account. You will then need to contact the person in your agency who created the AmeriCorps eGrants account (Grant Administrator) to be given the capability to use the recruitment features. Then you are ready to begin posting opportunities, searching for applicants based on your needs, contacting applicants, reviewing applications and selecting your volunteers.

For more information, refer Basecamp or visit <https://questions.nationalservice.gov/> to ask a question and/or <https://www.nationalservice.gov/resources/ameri-corps/member-assignment-listings>.

### Position Descriptions

Service assignments must be meaningful to the AmeriCorps member (a function of the placement and recruit matching system) and the community in which the service is performed. The goals of each position must be achievable. Members must be connected with people in the local community so ownership of the experience will be shared, ultimately assumed by the local community, and consequently, long lasting. Everyone must have true involvement (input and control) in the work. Projects must be possible within the time available (project duration, resources, terms of service, etc.).

Position descriptions should include all professional elements necessary to define the service assignment and the qualifications necessary to achieve it. Typically, position descriptions are too short, non-existent, unfamiliar to the AmeriCorps member, or filed away and never used once a project is begun. These documents should be revisited regularly to encourage member feedback, measure success and find areas which need enhancement. They should be modified to reflect changing needs as they develop and are useful in evaluating members' performance.

### Team Leader is a role/title that is recognized by AmeriCorps

The National and Community Service Act, as amended, provides for approved national service positions to include a “position involving service as a crew leader in a youth corps program or a similar position supporting a national service program that receives an approved national service position” 42 U.S.C § 12573(6). This language allows programs, in addition to youth corps, to use AmeriCorps members to provide an additional layer of leadership and support for members under certain conditions. The following is guidance on the use of AmeriCorps members as Team Leaders. Because of the need to ensure that Team Leader functions and staff functions remain clearly distinct, AmeriCorps program officers may request a description of Team Leaders’ roles and

responsibilities. ***Team Leaders are not permitted to act in a staff capacity.*** Supervising members is a staff responsibility. Team Leaders must not be responsible for program development and coordination, however, they may assist by providing information and resources on best practices or by helping to develop portions of the program such as the training curriculum. In essence, under no circumstances should an AmeriCorps member serving as a Team Leader be the individual legally responsible for the program or other members. The Team Leader position description should predominantly include activities that involve them in performing direct service or providing support to members engaged in direct service.

**\*Examples of allowable Team Leader activities: \***

- Working alongside members performing direct service, to serve as a model and to provide on the spot assistance
- Training members; providing guidance to members; providing support to members, including reflection exercises, conflict resolution, advice for transitioning out of AmeriCorps, etc.
- Arranging member development activities
- Building a sense of esprit de corps and general team cohesion among members
- Leading and facilitating team service projects
- Working with the community to develop partnerships, including community volunteers, that will support the members' projects
- Communicating with program staff, site supervisors, and other members to ensure the execution of a quality program that is consistent with the AmeriCorps provisions

While Team Leaders are not to serve as the program's administrative staff, they may be engaged, on a limited basis, in activities that support the administration of the AmeriCorps program. These include:

- Raising funds or in-kind contributions in direct support of specific AmeriCorps projects, such as team service projects. See the AmeriCorps Provisions for greater detail regarding members and fundraising.
- Participating in recruitment activities for new members.

**\*Examples of unallowable Team Leader activities: \***

- Signing member timesheets
- Evaluating member performance
- Disciplining AmeriCorps members
- Enrolling/dismissing AmeriCorps members
- Writing and/or signing program reports
- Managing the program's payroll and budget

**AmeriCorps Recruitment 101- Russ Donahue**

A successful recruitment strategy is the foundation for a thriving AmeriCorps program. AmeriCorps programs live and die by how well they network. The individuals you select and place within the community represent your program every day; their interactions either enhance or detract from your organization's reputation. Following are a number of important approaches that help develop a solid cadre of new members.

The first thing directors need to realize is that recruitment is not an event, but a process. Part of a solid recruitment plan includes frequent presentations to local high schools, colleges, fraternal organizations, parent-teacher organizations, governmental agencies, military spouse groups, and similar associations. These should be scheduled and held at least monthly. Obviously not all applicants

will meet the basic criteria, but increasing the number of applicants does allow for a more selective screening process.

The second most effective recruitment tool is your current members! Utilizing members to assist in this process yields enormous payoffs, and encouraging them to talk about their experiences is an excellent advertising instrument. Have members accompany you when making community presentations to allow those interested in joining AmeriCorps to ask direct questions of those already serving within the community. Sometimes members recruit individuals from within their immediate family, among friends and acquaintances, and even from informal conversations with people living in the community. No matter how well we illustrate national service positions through job descriptions, outreach, interviews, and advertising, allowing interested parties the opportunity to hear from current members helps prevent “sticker shock” once an individual becomes a member. Realistic expectations lead to greater member satisfaction—and higher rates of retention—during the program year.

After receiving applications, screening and placement of members is the next most critical step an AmeriCorps supervisor or director faces. After screening out clearly unqualified applicants (such as those who don’t pass criminal background checks or fail to meet standards or stated qualifications), it’s important to involve host agencies who will work directly with new members. This allows for a “second look” at the applications by an involved party, creates buy-in with the host agency staff, and adds another level of assessment for specific talents or skills that a director or supervisor may not be looking for during the initial screening.

Once the potential candidates are agreed on, the next step is to decide how to conduct the interviews. We generate a list of potential questions to ask each candidate, agree on which ones to use, and then commit them to writing so that each applicant is asked the same questions. This ensures all prospective members are treated equally and fairly, allowing for an “apples to apples” comparison when evaluating multiple candidates after the interviews. It is definitely worth considering including host agency staff in the interview process; this creates buy-in from the host agency and adds another level of insight for those candidates with similar qualifications. During the interviews good note-taking is crucial, especially if you interview many candidates.

## **2. Enrollment and Retention Rates**

AmeriCorps has the following expectations:  $\text{ENROLLMENT RATE} = \text{Total slots filled} / \text{total slots awarded}$ .

**Enrollment for programs should be 100%.**

$\text{RETENTION RATE} = \text{Total members exiting with an Education Award} / \text{total slots filled}$ .

**A target of 85% for retention or completion is desired.**

AmeriCorps realizes that many programs not yet meeting these rates are nevertheless performing well in their individual circumstances. Also, retention may vary among effective programs depending on the target populations for those programs. However, in order to leverage limited program dollars, AmeriCorps expects programs to strive toward improving their rates of enrollment and retention. During the application process, programs that are not meeting these standards need to offer a rationale for why not, as appropriate.

### **Recruitment/Retention Rate**

To view enrollment and retention using the data in My AmeriCorps:

1. Log into your account via eGrants
2. Select S&N Reports
3. Select the report you wish to view from the drop down menu (Enrollment Rate Report or Retention Rate Report)
4. Select Program year
5. Select format (PDF, Excel etc.)
6. Select Submit
7. You may open or save the report created

### **3. ADA Accommodations**

In compliance with the Americans with Disabilities Act (ADA) (42 U.S.C. 12101, et seq.), programs must provide reasonable accommodations to the known mental or physical disabilities of members, and all selections and project assignments must be made without regard to the need to provide reasonable accommodations. As a Program Director, you may be called upon to make decisions regarding reasonable accommodation. However, the law does not require that you provide reasonable accommodations for any participant who would pose a direct threat to the health and safety of others even if accommodated.

#### **Reasonable Accommodation Request Policy and Procedure**

Programs should submit any requests for reasonable accommodation to Serve Idaho. Serve Idaho will roll all requests into a quarterly submission per formula prime and submit them to CNCS. CNCS will then provide the reimbursement to Serve Idaho, and Serve Idaho will provide the reimbursement to the program. Grantees are eligible to submit requests for costs of products and services connected to disability accommodations or for the reimbursement of the costs of reasonable accommodations that were provided within the last 90 days and for which they have the required documentation.

It is important to understand that by applying for reasonable accommodation reimbursement grants, you are requesting to be reimbursed for expenses incurred. CNCS and Serve Idaho will not be making advance payments to cover reasonable accommodation expenses.

The reasonable accommodation grant funds are available on a noncompetitive basis and requests are processed in the order they are received.

CNCS *encourages* programs to determine what each of their service members' accommodation needs are for the service term/FY 2021 so they can submit requests for reimbursement. Requests for reimbursement of a single expense can be submitted at any time. If a program intends to request reimbursement for multiple expenses throughout the year, the program's initial request must estimate what the total reimbursable expenses will be. The request will be assigned an identification number, which the program must use to submit subsequent requests for reimbursement on a quarterly basis.

Grantees must retain and be prepared to provide documentation for each member for whom reasonable accommodation grant funds are requested. The documentation must show that:

- The goods or services needed to provide the reasonable accommodation were procured in conformance with the procurement standard specified in [2 C.F.R. 200.317](#) – [200.326](#) and
- Verification by the member that the accommodation was provided.

AmeriCorps will assign an identification number to each request for reasonable accommodation grant funds. This means that once a program has submitted a request, AmeriCorps will send

notification of the identification number that accompanies the transaction and it will be **the program's responsibility** to share this internally with those who track grant funds. It is important that the program include this tracking number when they are emailing receipts for reasonable accommodation service contracts that extend throughout the fiscal year.

**Process for submitting applications:**

Please send an email to [kimberly.empey@labor.idaho.gov](mailto:kimberly.empey@labor.idaho.gov) that contains a completed Serve Idaho Disability Accommodation Reimbursement Request form which you can find on Basecamp.

- Keep the Name of the organization listed on the form consistent with the name of your organization in eGrants

The process of selecting the accommodation should be an interactive collaboration between the AmeriCorps member, his or her supervisor, and program managers. Free technical assistance regarding disability accommodation is available through the Job Accommodation Network: [www.askjan.org](http://www.askjan.org)

The program will receive a response to their request for disability accommodation funds within a few weeks of submitting it. Do not include Personally Identifying Information in the request. Submission of application for reasonable accommodation funds serves as a certification by the Grantee that the AmeriCorps member for whom the accommodation funds are sought has a disability as defined in the Americans with Disabilities Act (ADA). "A person has a disability if they have a mental or physical impairment that substantially limits one or more major life activities."

The program is not required to obtain documentation that the service member has a disability if the disability is apparent.

The program should obtain documentation from a medical or rehabilitation expert to better understand the need for the reasonable accommodation for service member requests where a disability is non-apparent or the accommodation request is not straightforward. These professionals can also verify that someone meets disability status. There is much broader coverage under the ADA after the Amendments in 2008.

**Disability Benefits Question:**

If a potential AmeriCorps member or current AmeriCorps member has questions about how AmeriCorps benefits will affect Disability benefits have them contact DisAbility Rights Idaho 208-336-5353 or 1-800-632-5125.

## **4. Verifying Identity and Citizenship of Members**

By law, to serve in an approved AmeriCorps position, an individual must be a citizen, national, or lawful permanent alien of the United States ([45 U.S.C. 2522.200 \(a\)\(3\)](#)).

If an individual's information cannot be automatically verified by the Social Security Administration, through the e-Grants/MyAmeriCorps Portal, AmeriCorps State and National grantees will no longer receive an email requesting them to fax documentation to the National Service hotline. AmeriCorps State and National grantees will instead receive an email notifying them that the individual's SSN and citizenship could not be verified and that the grantee needs to obtain and submit to AmeriCorps via a secure file transfer the required documentation. Programs should also keep a physical file with copies of eligibility documents including SSN information and citizenship documentation. Approved citizenship documentation includes the documents outlined in [45 CFR 2522.200 c-e](#).

In 2018, AmeriCorps had issues with the automated e-mail notifications related to SSN and citizenship verification. As a result, Serve Idaho recommends that you monitor members' verification status in e-Grants. This can be done by following the screenshots outlined in the FAQ link: [https://www.nationalservice.gov/sites/default/files/documents/SSN\\_Citizenship\\_Verification\\_Process\\_FAQs.pdf](https://www.nationalservice.gov/sites/default/files/documents/SSN_Citizenship_Verification_Process_FAQs.pdf).

Member verification status will show as Pending, Pending Manual Verification, Verified, Manually Verified, Manually Returned, Returned, Cannot be Verified or Previously Served. Definitions of each of these terms are found at:

[https://my.americorps.gov/trust/help/applicant/Citizenship\\_Validation\\_Status.htm](https://my.americorps.gov/trust/help/applicant/Citizenship_Validation_Status.htm)

Unless the status is Verified, Manually Verified or Previously Served, a program cannot move forward with the enrollment process. If the status is Manually Returned, or Returned, additional documentation will need to be sent to CNCS via secure file transfer.

An explanation of how to request a secure file transfer is included in Basecamp.

If the individual or grantee wishes to update the individual's name, date of birth, or social security number in the My AmeriCorps system, they will still need to send in documentation via secure file transfer so that the updates can be made. Individuals may have difficulty using their Segal AmeriCorps Education Award if this information in the system is incorrect.

For additional information regarding identity or citizenship verification, please visit the member enrollment resources in Basecamp.

If after reviewing the FAQs you have additional questions, please contact the National Service Hotline at 1-800-942-2677 or fill out a webform at <https://questions.nationalservice.gov/>

## 5. Background Checks

Under the Serve America Act (SAA) all sub-grantees **must** conduct National Service Criminal History Checks (NSCHC) as described below, on all participants in AmeriCorps, as well as on all "covered positions". That is, all AmeriCorps program **staff and site supervisors** and **others** who **receive a salary**, national service **educational award, living allowance, stipend** or who are **listed as match** under the AmeriCorps **grants**. Failure to comply with this directive will result in the disallowance of financial compensation.

In addition to completing the NSCHC background checks on time and retaining supporting documentation, program staff who work with background checks must take the AmeriCorps NSCHC e-course annually. The e-course is located at: <http://www.nationalservice.gov/resources/criminal-history-check> Look for the **Required Annual Online Training** button for a link to the e-course. Once the e-course has been completed, print two copies of the e-course certificate. Maintain one copy for your internal records, and send the other copy to Serve Idaho's Grants Officer. **Completed staff certificates must be submitted with the signed contract annually. Grantees cannot begin grant activities for the program year until Serve Idaho has received documentation of the completed online NSCHC training.**

Applicants for covered positions who will not have recurring access to vulnerable individuals **must** undergo a National Service Criminal History Check (NSCHC) that includes:



- A nationwide check of the National Sex Offender Public Web site (NSOPW) **must be completed, including adjudication by program, before the covered individual begins service.**
- A name based search of the state criminal registry in the state in which the grantee is operating **and** the state in which the individual resides at the time of application **must be initiated (if using Idaho State Police) before the covered individual begins service.**

If the applicant is 18 years of age or will become 18 years of age during service and has recurring access to children age 17 or younger, individuals age 60 or older, or individuals with disabilities, they must also undergo the following additional check:

- Submission of fingerprints through a state central record repository to the Federal Bureau of Investigation for a national criminal history background check **must be initiated before the covered individual begins service.**

#### **PROCEDURES:**

A potential member **may not start service**, including orientation and training hours, until the **NSOPW search is completed and adjudicated by the program and the state criminal history check(s) and, if appropriate, the FBI fingerprint check have been initiated.**

#### **Utilizing Truescreen and Fieldprint (required for all grantees):**

In 2019, AmeriCorps identified an approved vendor for NSOPW and State Checks ([Truescreen](#)) as well as an approved vendor for FBI fingerprint checks ([Fieldprint](#)). All Idaho state sub grantees must utilize these vendors.

When using Truescreen and Fieldprint, a check is not complete or compliant until the results have been adjudicated by the program. Adjudication of NSOPW and State checks must be completed in Truescreen prior to a covered individual's start on the grant. Failure to adjudicate an individual's NSOPW and State checks prior to their start on the grant will result in a disallowance.

Programs must document adjudication of Fieldprint checks by printing the report, writing on it that the results of the check were reviewed by the program and the individual is cleared for service or work, dating and signing it, and saving it in the member file.

If a program is using Truescreen and Fieldprint, then an individual may begin service or work when the NSOPW and State checks have been adjudicated by the program and the FBI check has been initiated as long as the individual is accompanied until the FBI check is adjudicated by the program.

CNCS has developed very thorough manuals and trainings on using Truescreen and Fieldprint. These resources are included below:

[\*Using Fieldprint and Truescreen for NSOPW, State and FBI Checks Manual\*](#) provides a step by step process for creating accounts in Truescreen and Fieldprint, as well as NSCHC documentation requirements that are covered by using Truescreen and Fieldprint.

[\*NFF and Truescreen ASP Table\*](#) helps identify which checks should be run if you have a member whose state of residence is outside of Idaho. There are two tabs in this Excel workbook. One tab is for members who have no or episodic access to vulnerable populations, the other tab is for members who have recurring access to vulnerable populations. When determining which state checks need to be run, ensure that you have selected the correct

tab for your member. If a member's state of residence is Idaho at the time of application, then a program will only need to run a Truescreen NSOPW check and an FBI Fieldprint Check as Idaho is one of the states that participates in the National Fingerprint File (NFF) program.

[\*Truescreen and Fieldprint Checks State by State\*](#) helps identify the cost of running a state check through Truescreen as well as the average turn around for those state checks. If a grant recipient orders a state and NSOPW check together for the same individual, there is a \$0.50 discount on the total cost of the state and NSOPW check.

#### *Training Videos*

CNCS has created several training videos, included below, that should be viewed prior to and while using the Truescreen and Fieldprint Vendors.

[\*Your Required Checks: Understanding how new and expiring Alternative Search Procedures \(ASPs\) may impact you \(60 mins\)\*](#)

[\*Introduction to the Truescreen System \(60 mins\)\*](#)

[\*Check Your Check: Ensuring Compliance with Truescreen and Fieldprint \(22 mins\)\*](#)

### **Accompaniment**

If an individual is in a covered position and has recurring access to vulnerable populations, the individual must be accompanied while their State and/or FBI checks are pending whenever they are in contact with vulnerable populations.

“Accompanied” means **they are in the physical presence of someone who meets the definition of “compliant accompanier” below.** Once all results including NSOPW, state and FBI checks are cleared accompaniment can cease. When the state of residence differs from the state of service, then both state checks must be cleared to cease accompaniment. Accompaniment is not an alternative to late or noncompliant checks. Accompaniment must be documented as outlined below.

#### Compliant Accompanier:

- An employee or representative of a placement site may provide accompaniment if that individual's clearance was established under the placement site's rules. For example, if an individual is going to serve in a nursing home, any staff not on an AmeriCorps grant that the nursing home has cleared for access can provide accompaniment.
- Parents and guardians of an individual who is a member of a vulnerable population may also provide accompaniment, as appropriate for the program design.
- If the individual who provides accompaniment is in a covered position on an AmeriCorps grant, they must be cleared by the AmeriCorps NSCHC requirements for access to vulnerable populations before providing accompaniment.
- Anyone who has cleared, and maintained a compliant NSCHC, regardless of whether or not that individual is in a covered position on an AmeriCorps grant.

#### Compliant Accompaniment Documentation:

Accompaniment must be documented **contemporaneously.** Documents must include the **time, date, and name of the accompanying individual as well as signature of accompanier and**

**member**. If accompaniment does not meet the criteria above, it is not compliant.

Programs must have policies and procedures that clearly describe their accompaniment guidelines and the compliant procedures for documenting accompaniment. If serving as a multi-site intermediary, programs must train their service sites on the accompaniment policies and procedures of the program.

Programs placing their members at multiple placement sites should ensure they have written policies and procedures in place to document criminal history checks for staff whose time is not captured as match on the grant but who provide accompaniment to members.

If the site placement has its own procedure for clearing staff members for access to vulnerable populations, please document in the accompanier file:

1. The procedures the placement site uses to clear staff for access to vulnerable populations,
2. Documentation that the accompanier was cleared through these processes.

If the site placement does not have any procedures for clearing staff for access to vulnerable populations, the following free checks should be run by the program at a minimum:

- NSOPW (<https://www.nsopw.gov/> )
- Check of Idaho State Repository  
(<https://mycourts.idaho.gov/odysseyportal/Home/WorkspaceMode?p=0> )

For individuals who will be teleserving as a result of the COVID-19 pandemic, programs must ensure that communication with vulnerable populations include accompaniment. This may be done via conference call, carbon copy on emails, or other means specific to the teleservice.

### **Using criminal background results.**

Results of any of the above mentioned checks may only be used for determining eligibility for employment by an authorized employee of the agency who has been previously cleared by a criminal background check.

Grantees must retain the criminal history check results along with written documentation that they considered the results in selecting the individual and that the individual was notified that the position is contingent on the results.

Grantees should be mindful that arrests alone are mere allegations and actual criminal convictions are the relevant indicators of an individual's eligibility to serve. The program should document that they gave written notice, signed by the applicants, that the applicant has the right to review and challenge the results of the NSCHC, along with the steps to do so.

The law prohibits an individual from serving in a national service program in four situations:

- The individual refuses to consent to the criminal history check.
- The individual makes a [false statement](#) in connection with the criminal history check.
- The individual is registered or required to be registered as a sex offender.
- The individual has been convicted of first degree murder as defined by federal law (18 USC 1111).

If the NSCHC returns results that implicate criteria other than those above, the grantee has the discretion to decide if the results disqualify an individual from service. Grantees should consider the

nature and gravity of the offense, the time passed since the conviction or completion of the sentence and the nature of the position. Grantees must have written policies of their disqualification criteria.

### **Retention and Security of Criminal History Record Information (CHRI)**

CHRI shall only be used for the purpose it was requested and only provided to personnel with a “NEED TO KNOW”.

CHRI must be stored in an electronically secure location or in a physically secure location, e.g., a locked file cabinet or drawer. It shall be prominently posted and separated from non-secure locations. Also, the agency shall develop and keep a current list of personnel with authorized access.

CHRI may not be disseminated without a signed release unless otherwise provided by law. CHRI may be given to the applicant upon request where the applicant’s identity can be verified. The delivery of CHRI to the applicant can be mailed USPS mail after a waiver has been signed by the applicant requesting a copy.

CHRI should be kept only as long as it pertains to a particular case. Once the hiring decision is made, CHRI of those not selected must be destroyed. The only approved methods of destruction are incineration and shredding. Agencies need to have written policies, procedures and timelines for the destruction of CHRI.

### **CHC Check List**

- ☐ Verify identity against government issued photo identification and keep in file.
- ☐ Determine whether the individual has recurring or episodic/no access to vulnerable populations
- ☐ Pay for the checks.
- ☐ Perform and adjudicate the NSOPW check in Truescreen before service/work begins.
- ☐ Initiate criminal history information checks no later than the start of service/work; if using Truescreen and Fieldprint, individuals must be accompanied until both checks are cleared and adjudicated.
- ☐ Document the initiation of a fingerprint FBI check
- ☐ Consider individual results and adjudicate the State Check(s) and if applicable the FBI check
- ☐ Document the accompaniment of those with pending checks when in contact with vulnerable populations. Accompaniment must be documented daily and signed by member and accompanier contemporaneously until accompaniment ends.
  - If using Truescreen and Fieldprint, accompaniment can begin once the NSOPW check have been adjudicated by the program in Truescreen, and the State Check(s) and FBI check has been initiated in Fieldprint. If using Truescreen and Fieldprint, accompaniment ends once the State Check(s) AND FBI results are adjudicated by the program.
- ☐ Document notice of the opportunity for review and challenge of findings for Fieldprint check (this process is captured in the Truescreen system but not in Fieldprint)
- ☐ Maintain the results of the checks and when they were received in the file. Document that you verified identity and considered the results of the checks in the hiring decision for Fieldprint check (this process is captured in the Truescreen system but not in Fieldprint)
- ☐ Keep the information confidential and in a secure location.

### **Background checks resources:**

For additional information: <http://www.nationalservice.gov/resources/criminal-history-check> or visit the [Criminal History Check folder on Basecamp.](#)

## **6. Nondiscrimination Laws**

All programs must comply with all applicable provisions of state and federal laws and Regulations pertaining to nondiscrimination, sexual harassment, and equal employment opportunity including, but not limited to, the following law and regulations and all the subsequent amendments thereto:

(a) An individual with responsibility for the operation of a project that receives AmeriCorps assistance must not discriminate against a participant in, or member of the staff of, such project on the basis of race, color, national origin, sex, age, or political affiliation of such participant or member, or on the basis of disability, if the participant or member is a qualified individual with a disability.

(b) Any AmeriCorps assistance constitutes Federal financial assistance for purposes of title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq.), title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.), section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794), and the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.), and constitutes Federal financial assistance to an education program or activity for purposes of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.).

(c) An individual with responsibility for the operation of a project that receives AmeriCorps assistance may not discriminate on the basis of religion against a participant in such project or a member of the staff of such project who is paid with AmeriCorps funds. This provision does not apply to the employment (with AmeriCorps assistance) of any staff member of an AmeriCorps-supported project who was employed with the organization operating the project on the date the AmeriCorps grant was awarded.

(d) Grantees must notify all program participants, staff, applicants, and beneficiaries of:

- (1) Their rights under applicable federal nondiscrimination laws, including relevant provisions of the national service legislation and implementing regulations; and
- (2) The procedure for filing a discrimination complaint with the AmeriCorps Office of Civil Rights and Inclusiveness.

[59 FR 13808, Mar. 23, 1994, as amended at 73 FR 53752, Sept. 17, 2008]

## **7. Member Service Agreement**

The standard member service agreement in particular should be reviewed carefully to ensure that it contains the following items:

- The minimum number of service hours and other requirements (as developed by the Program) necessary to successfully complete the term of service and to be eligible for the education award;
- Start and end dates of the member's term of service;
- Amount of the living allowance;
- How the member will be paid;
- Acceptable conduct;
- Description of the other benefits available to the member;
- Standards of conduct and sanctions for improper conduct;
- Prohibited activities, including those specified in the regulations;
- Requirements under the Drug-Free Workplace Act (41 U.S.C. 701 et seq.);
- Termination and suspension rules (including the specific circumstances under which a member can be released for cause);

- Position description for the member;
- Grievance procedures;
- Any other program-specific requirements;
- Signatures of both the member and the program director;

Refer to Basecamp for a Member Service Agreement Template –

## 8. Member Orientation

Member orientation should prepare members for their year of service. Orientation can help them acquire the skills and knowledge they need to “get the job done”. A strong orientation will pay off in program outcomes, with members who know the purpose of their service and have the skills to accomplish program objectives. The AmeriCorps Member Orientation Checklist is as follow:

Listed below are items AmeriCorps **mandates** to be covered in the orientation of members:

- **Member rights and responsibilities;**
- **Specific skills and knowledge to perform service;**
- **Program’s code of conduct (May be included in member manual);**
- **Prohibited Activities (May be included in member manual);**
- **Drug Free Workplace (May be included in member manual);**
- **Suspension and Termination Rules;**
- **Grievance Procedures;**
- **Equal Opportunity, Affirmative Action, Non-Discrimination activities;**
- **Sexual Harassment Awareness Education;**
- **Specific Safety Procedures- member security;**
- **Sensitivity to the Community;**
- **Introduction to National Service and AmeriCorps;**
- **My AmeriCorps Portal;**
- **Timesheet Reporting (timesheets and approval process)**

Listed below are items the Commission **strongly encourages** to be included in the orientation of members:

- **National Service: The Big Picture (The AmeriCorps orientation video, “Getting Things Started” is a good tool to utilize);**
- **The History of Service in America;**
- **Serve Idaho’s role in AmeriCorps;**
- **Host sites;**
- **AmeriCorps network of over 75,000 members;**
- **Discussion of the AmeriCorps ethic;**
- **Importance of Getting Things Done;**
- **Responsibilities that individuals have to themselves, their families, their community, and the nation -civic responsibility and civic reflection;**
- **Program rules, regulations, and benefits;**
- **Member handbook;**
- **Allowed activities;**
- **Living allowance;**
- **Staff and member roles;**
- **Understanding the objectives of the program and how to collect data;**
- **Eligibility of full time members for Health Care/Childcare**

## 9. Member Timesheets

Members will keep track of their time through America Learns beginning Fall 2020. This will replace My Service Log.

AmeriCorps members may not enroll prior to the start date of the grant award. AmeriCorps members may not begin service prior to the beginning of the member enrollment period as designated in the grant award. A program may not certify any hours a member performs until the enrollment process is complete.

## 10. Member Files

Programs must maintain a member file for each member. It is recommended you purchase the hanging file folders with the two additional tabs in the center. For auditing purposes all AmeriCorps programs need to maintain their files **in the following order**:

### **1<sup>st</sup> Tab**

Member Contract (signed before commencement of service);  
Member Service Description (job description);  
Emergency Notification;  
Media Release;  
Documentation of Healthcare Enrollment or Waiver;  
Documentation of Childcare Enrollment (if applicable);  
Documentation Loan Forbearance information was provided  
;  
High School Diploma or Self Certification;  
CPR Certification (if applicable) Eligibility Forms;  
Documentation of Citizenship ([See 45 CFR 2522.200 c, d and e](#));  
FBI Check results and adjudication and Verification of Accompaniment (if applicable, must be documented contemporaneously);  
Application;  
Parental Consent (if applicable)

### **2<sup>nd</sup> Tab**

Performance Evaluations (Mid-Term and End of Term for Full-Time Members; End of Term for all Members serving in less than Full-Time slots) ;  
Documentation of Verbal Warnings and/or Written Warnings

### **3<sup>rd</sup> Tab**

Exit Forms  
Health Insurance Exit Form  
Documentation of Compelling Personal Circumstances  
Documentation of Release for Cause  
Change of Status/Change of Term

## 11. Service Gear

Grant funds may be used to pay for a standard Service Gear package (AmeriCorps T-shirt, sweatshirt, hat, lapel pin) for members. Serve Idaho urges programs to provide this package to members. If the standard Service Gear package is not purchased, Programs must provide Members with a comparable package.

Items can be ordered online at <http://gooddeed.org/mericorps.aspx> or <https://www.nationalservicegear.org>

## 12. Material Request

Grant funds may be used to purchase informational material (brochures, application packets, posters, publications, etc.). On occasion, select items are free of charge.

Items can be ordered online at <https://pubs.nationalservice.gov/>.

## 13. Member Status

### Member Enrollment

All Member Enrollment Forms must be entered and approved in My AmeriCorps **within 8 calendar days of a member starting service in the program**. Members must create a My AmeriCorps Portal account in order to complete their enrollment. (

In 2019, CNCS changed the enrollment requirement from 5 days to 8 days. Further information on the pre-enrollment and enrollment requirements can be found on Basecamp and the link below:

<https://www.nationalservice.gov/sites/default/files/documents/ASN%20Enrollment%20and%20Enrollment%20Date%20Change%20Policy%2019-04%20corrected.pdf>

### Assigning Members to Service Locations

The program is required to ensure that all operating sites and all service locations are entered in the My AmeriCorps portal for all members within seven calendar days of the members' start date. The program is required to include the name of the service site, and the full physical address including zip-plus-four of the service locations where each member will be serving. If a member is serving at multiple service locations, the program must enter the site where the member serves the majority of his or her hours as the member's primary assignment.

### Member Exit

All Member Exit Forms **must** be entered and approved in My AmeriCorps **within 30 calendar days** of a member exiting the program. Members must create a My AmeriCorps Portal account in order to complete their exit information and to manage their education award. All members must complete their term of service within one year of their start date. This completion requirement is for all members. Members, who have had their term suspended, may increase their service agreement by the number of days suspended but not to exceed the Program year end date.

### Change of Status

Programs **must** have approval from Serve Idaho prior to entering and approving a Change of Status Form in My AmeriCorps. Programs shall submit a written letter requesting approval. Refer to the AmeriCorps Provisions for policy guidance.

### Release for Compelling Personal Circumstance [45 CFR 2522.230](#)

Conditions attributable to the program or otherwise unforeseeable and beyond the participant's control, such as a natural disaster, pandemic, a strike, relocation of a spouse, or the nonrenewal or premature closing of a project or program, that make completing a term unreasonably difficult or impossible;

**Those that the AmeriCorps, has for public policy reasons, determined as such, including:**

- (A) Military service obligations;
- (B) Acceptance by a participant of an opportunity to make the transition from welfare to work; or



(C) Acceptance of an employment opportunity by a participant serving in a program that includes in its approved objectives the promotion of employment among its participants.

**Compelling personal circumstances do not include leaving a program:**

- (i) To enroll in school;
- (ii) To obtain employment, other than in moving from welfare to work or in leaving a program that includes in its approved objectives the promotion of employment among its participants; or
- (iii) Because of dissatisfaction with the program.

**Suspension**

As an alternative to releasing a participant, an AmeriCorps\*State/National program may, after determining that compelling personal circumstances exist, suspend the participant's term of service for up to two years to allow the participant to complete service with the same or similar AmeriCorps program at a later time.

**Release for Cause**

- (1) A release for cause encompasses any circumstances other than compelling personal circumstances that warrant an individual's release from completing a term of service.
- (2) AmeriCorps programs must release for cause any participant who is convicted of a felony or the sale or distribution of a controlled substance during a term of service.
- (3) A participant who is released for cause may not receive any portion of the AmeriCorps education award or any other payment from the National Service Trust.
- (4) An individual who is released for cause must disclose that fact in any subsequent applications to participate in an AmeriCorps program. Failure to do so disqualifies the individual for an education award, regardless of whether the individual completes a term of service.
- (5) An AmeriCorps\*State/National participant released for cause may contest the program's decision by filing a grievance. Pending the resolution of a grievance procedure filed by an individual to contest a determination by a program to release the individual for cause, the individual's service is considered to be suspended. For this type of grievance, a program may not—while the grievance is pending or as part of its resolution—provide a participant with federally-funded benefits (including payments from the National Service Trust) beyond those attributable to service actually performed, without the program receiving written approval from AmeriCorps.
- (6) An individual's eligibility for a subsequent term of service in AmeriCorps will not be affected by release for cause from a prior term of service so long as the individual received a satisfactory end-of-term performance review as described in § [2522.220\(c\)\(2\)](#) for the period served in the first term.
- (7) Except as provided in paragraph (e) of this section, a term of service from which an individual is released for cause counts as one of the terms of service described in § [2522.235](#) for which an individual may receive the benefits described in § [2522.240](#) through § [2522.250](#).

**Suspended service**

- (1) A program must suspend the service of an individual who faces an official charge of a violent felony (e.g., rape, homicide) or sale or distribution of a controlled substance.
- (2) A program must suspend the service of an individual who is convicted of possession of a controlled substance.
- (3) An individual may not receive a living allowance or other benefits, and may not accrue service hours, during a period of suspension under this provision.

**Reinstatement**

- (1) A program may reinstate an individual whose service was suspended under paragraph (c)(1) of this section § [2522.230](#) if the individual is found not guilty or if the charge is dismissed.

(2) A program may reinstate an individual whose service was suspended under paragraph (c)(2) of section § [2522.230](#) only if the individual demonstrates the following:

- (i) For an individual who has been convicted of a first offense of the possession of a controlled substance, the individual must have enrolled in a drug rehabilitation program;
- (ii) For an individual who has been convicted for more than one offense of the possession of a controlled substance, the individual must have successfully completed a drug rehabilitation program.

### **Release Prior to Serving 15 Percent of a Term of Service**

If a participant is released for reasons other than misconduct prior to completing 15 percent of a term of service, the term will not be considered one of the terms of service described in § [2522.220](#)(b) for which an individual may receive the benefits described in § [2522.240](#) through § [2522.250](#).

### **Term of Service Limit**

(a) *General limitation.* An individual may receive the benefits described in § [2522.240](#) through § [2522.250](#) for no more than four terms of service in an AmeriCorps State and National program, regardless of whether those terms were served on full-, part-, or reduced part-time basis.

(b) *Early release.* Except as provided in paragraph (c) of section § [2522.235](#), a term of service from which an individual is released for compelling personal circumstances or for cause counts as one of the terms of service for which an individual may receive the benefits described in § [2522.240](#) through § [2522.250](#).

Note: If you make any changes to My AmeriCorps, you must add that same information to the member file. The My AmeriCorps system and the member files should include the same information.

## **14. Member Slots**

The allowable slot types and associated FTEs are listed in the table below.

<b>Service Term</b>	<b>Service Hours</b>	<b>MSY's</b>
Full Time (FT)	1700	1
Three-Quarter Time (TQT)	1200	0.7
Half Time (HT)	900	.5
Reduced Half Time (RHT)	675	0.38095240
Quarter Time (QT)	450	0.26455027
Minimum Time (MT)	300	0.21164022

### **Slot Conversions**

Serve Idaho may approve occasional changes of currently enrolled members to lesser-term slots. The program must submit a written request to Serve Idaho for a slot conversion by completing the slot conversion form found on Basecamp. Serve Idaho and the program must take into account the impact on the program quality. AmeriCorps will not cover health care or childcare costs for less than full-time members.

Programs may not request a transfer of currently enrolled members to a lesser-term status simply to provide a pro-rated education award if the member would otherwise be released for cause. It is also not allowed to request to convert a slot to a lesser-term slot at the end of a member's term of service in order to award a pro-rated education award when the member has not completed the hours required by their original term.

Changing less than full-time members to a greater slot type is discouraged because it is very difficult to manage, unless done very early in the member's term of service. Serve Idaho may approve such changes only in extenuating circumstances as long as the program's current budget can accommodate such changes. The program must request the slot conversion in writing. Keep in mind that a member's minimum hours must be completed within 12 months of the member's original start date.

Slot conversions cannot be completed for fixed amount grants.

### **Unfilled Slot Conversions**

Programs must submit a request for an unfilled slot conversion in writing to Serve Idaho. Serve Idaho has 7 business days to review and complete slot conversions. For example one full-time position can be converted to up to three quarter-time positions. All conversions must be Trust neutral, are subject to availability of funds in the Trust, and must comply with all assumptions on which Trust prudence and continued solvency are predicated. The total number of MSYs and education award amounts in the grant may not increase as a result of the slot conversion.

For example:

- 1 full-time member position (1 MSY) may be converted into 2 half-time slots (2 x .5 members = 1 MSY).
- 1 full-time member position may not be converted into 4 quarter-time positions as the education awards would total more than the original (4 X .2646); in this example, the maximum number of allowable quarter-time positions would be 3.

Grantees may also combine and convert less than full-time positions to full-time positions as long as such changes do not increase the total MSYs or total education award amounts awarded in the grant.

### **Refill Slots**

Eligible AmeriCorps State and National programs that have fully enrolled their awarded member slots are allowed to replace any member who terminates service before completing 30 percent of his/her term provided the member who terminates is not eligible for and does not receive a pro-rated education award. **Programs may not refill the same slot more than once.**

As a fail-safe mechanism to ensure AmeriCorps resources are available in the national service trust to finance any member's education award, AmeriCorps will suspend refilling if either:

- Total AmeriCorps enrollment reaches 97 percent of awarded slots
- The number of refills reaches five percent of awarded slots.

## **15. Tutoring Requirements**

A tutor is defined as someone whose primary goal is to increase academic achievement in reading or other core subjects through planned, consistent, one-to-one or small-group sessions and activities that build on the academic strengths of students in kindergarten through 12th grade, and target their academic needs. A tutor does not include someone engaged in other academic support activities, such as mentoring and after-school program support, whose primary goal is something other than increasing academic achievement. For example, providing a safe place for children is not tutoring, even if some of the program activities focus on homework help.

### **§ 2522.940 – A program in which members engage in tutoring for children must:**

- (a) Articulate appropriate criteria for selecting and qualifying tutors, including the requirements in §2522.910 of this subpart;

- (b) Identify the strategies or tools it will use to assess student progress and measure student outcomes;
- (c) Certify that the tutoring curriculum and pre-service and in-service training content are high-quality and research based, consistent with the instructional program of the local educational agency or with State academic content standards;
- (d) Include appropriate member supervision by individuals with expertise in tutoring;
- (e) Provide specialized high-quality and research-based, member pre-service and in-service training consistent with the activities the member will perform;
- (f) Curriculum must be consistent with both state academic standards and the instruction program of the local educational agency.
- (g) ) Certify that members serving as tutors possess a minimum of a high school diploma.

#### **§ 2522.920 – Exceptions to the qualifications requirements**

The qualifications requirements in §2522.910 of this subpart do not apply to a member who is a K–12 student tutoring younger children in the school or after school as part of a structured, school-managed cross-grade tutoring program.

### **16. Living Allowance**

A program must provide a *minimum living allowance of \$14,279* per year with a maximum of \$28,558 per year to your full-time members.

A living allowance *is not required for less than full-time members*. If you choose to provide less than full-time members with a living allowance, you may use the following chart as a guide.

<b>Term of Service</b>	<b>Minimum # of Hours</b>	<b>Maximum Total Living Allowance</b>	<b>MSY</b>
Full Time	1700	\$28,558	1
Three Quarter Time	1200	\$20,159	.70
Half Time	900	\$15,119	.50
Reduced Half Time	675	\$11,339	.38
Quarter Time	450	\$7,559	.26
Minimum Time	300	\$5,040	.21

### **17. Education Award**

#### **Amount of the AmeriCorps Education Award**

The amount of the AmeriCorps Education Award depends on the length of a member's term of service. The current amount of the Education Award for each term of service is as follows:

<b>Enrollment Status</b>	<b>Hours</b>	<b>Award</b>
Full Time	1700	\$6,195.00
Reduced Full-Time	1200	\$4,366.50
Half Time	900	\$3,097.50
Reduced Half Time	675	\$2,360.00
Quarter Time	450	\$1,638.89
Minimum Time	300	\$1,311.11

Payments made from AmeriCorps Education Award are considered taxable income in the AmeriCorps makes the payment to the school or loan holder. A member serving in a full-time term of service is required to complete service within 9 to 12 months.

## **Eligibility**

Members are eligible for an AmeriCorps Education Award if they successfully complete their term of service in accordance with the member service agreement with an AmeriCorps State program.

As the member uses the AmeriCorps Education Award, they must have received a high school diploma, or the equivalent of such diploma.

## **Award Limitations**

Under no circumstances will an individual be eligible to receive more than an amount equal to the aggregate value of two full-time education awards. The *value* of an education award is equal to the actual amount of the education award received divided by the amount of a full-time education award in the year the AmeriCorps position to which the award is attributed was approved. Each award received will be considered to have a value between 0 and 1. Although the *amount* of a full-time award as defined in § 2527.10 may change, the *value* of a full-time award will always be equal to 1.

The National Service Trust does not make payments to anyone other than qualified schools and loan holders. See your financial aid counselor for information on how they handle disbursements and reimbursements of the AmeriCorps Education Award.

Members have seven years to use the education award from the date of their completion of service. They can divide up their award and use portions of it at different times, as long as it is for authorized expenditures within the specified time period. Members could, for example, apply a portion of it to existing qualified student loans and save the remainder to pay for authorized college costs in the future.

## **Transfer of the Education Award § [2530.30](#)**

### **Request for Transfer**

Members 55 and older may transfer their education award. Before transferring an award to a designated individual, AmeriCorps must receive a request from the transferring individual, including—

- (1) The individual's written authorization to transfer the award, the year in which the award was earned, and the specific amount of the award to be transferred;
- (2) Identifying information for the individual designated to receive the transferred award;
- (3) A certification that the transferring individual meets the requirements of paragraphs (a) through (c) of § [2530.10](#); and
- (4) A certification that the designated individual is the child, grandchild, or foster child of the transferring individual.

### **Notification to Designated Individual**

Upon receipt of a request including all required information listed above, AmeriCorps will contact the designated individual to notify the individual of the proposed transfer, confirm the individual's identity, and give the individual the opportunity to accept or reject the transferred award.

### **Acceptance by Designated Individual**

To accept an award, a designated individual must certify that the designated individual is the child, grandchild, or foster child of the transferring individual and that the designated individual is a citizen, national, or lawful permanent resident alien of the United States. Upon receipt of the designated individual's acceptance, AmeriCorps will create or permit the creation of an account in the

National Service Trust for the designated individual, if an account does not already exist, and the accepted amount will be deducted from the transferring individual's account and credited to the designated individual's account.

### **Timing of Transfer**

AmeriCorps must receive the request from the transferring individual prior to the date the award expires.

For additional information about the Education Award please contact the National Service Trust at 1-800-942-2677 or visit [http://www.nationalservice.gov/programs/american-corps-education-award](http://www.nationalservice.gov/programs/americorps/segal-american-corps-education-award).

### **Segal Education Award – College/University Match**

For a list of institutions that match the Segal AmeriCorps Education Award visit:

<https://www.nationalservice.gov/programs/american-corps/segal-american-corps-education-award/matching-institutions>

## **18. Child Care**

Programs must provide child care through an eligible provider or a child care allowance in an amount determined by AmeriCorps to those full-time participants who need child care in order to participate.

- (1) Need. A participant is considered to need child care in order to participate in the program if:
  - (i) Is the parent or legal guardian of, or is acting in loco parentis for, a child under 13 who resides with the participant;
  - (ii) Has a family income that does not exceed 75 percent of the State's median income for a family of the same size;
  - (iii) At the time of acceptance into the program, is not currently receiving child care assistance from another source, including a parent or guardian, which would continue to be provided while the participant serves in the program; and
  - (iv) Certifies that he or she needs child care in order to participate in the program.
- (2) Provider eligibility. Eligible child care providers are those who are eligible child care providers as defined in the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858n(6)).
- (3) Child care allowance. The amount of the child-care allowance may not exceed the applicable payment rate to an eligible provider established by the State for child care funded under the Child Care and Development Block Grant Act of 1990 (42 U.S.C. 9858c(4)(A)).
- (4) AmeriCorps share. AmeriCorps will pay 100 percent of the child care allowance, or, if the program provides child care through an eligible provider, the actual cost of the care or the amount of the allowance, whichever is less.

The criteria for member eligibility are contained in [45 C.F.R. §2522.250](#).

### **Childcare is provided by:**

GAP Solutions Inc.

Toll-Free number (855) 886-0687

EMAIL: [AmeriCorpsChildCare@gapsi.com](mailto:AmeriCorpsChildCare@gapsi.com)

Fax: 1-800-521-5415

Send mail inquires:

ATTN: AmeriCorps Childcare Program

205 Van Buren St.

Ste. 205

Herndon, VA 20170

Visit <https://www.americorpschildcare.com/> for the Child Care Application as well as specific information regarding the childcare benefits.

## 19. Health Insurance

Programs must provide healthcare coverage to all eligible participants who meet the following requirements:

1. Be a full-time member;
2. Is not otherwise covered by a health benefits package providing minimum benefits established by AmeriCorps at the time he or she is accepted into a program;
3. If, as a result of participation, or if, during the term of service, a participant demonstrates loss of coverage through no deliberate act of his or her own, such as parental or spousal job loss or disqualification from Medicaid, the participant will be eligible for health care benefits.

Programs may provide health insurance to less-than-full-time members serving in a full-time capacity, but they are not required to do so. A member is serving in a full-time capacity when the regular term of service will involve performing service on a normal full-time schedule for a period of six weeks or more. A member may be serving in a full-time capacity without regard to whether their agreed term of service will result in a full-time Segal AmeriCorps Education Award.

AmeriCorps will not cover healthcare costs for family members.

Any of the following health insurance options will satisfy the requirement for health insurance for full-time AmeriCorps members (or less than full-time members serving in a full-time capacity): staying on parents' or spouse's plan; insurance obtained through the Federal Health Insurance Marketplace of at least the Bronze level plan; insurance obtained through private insurance broker; Medicare or military benefits. AmeriCorps programs purchasing their own health insurance for members must ensure the plan meets minimum essential coverage (MEC) requirements of the Affordable Care Act.

If coverage is being provided via the Healthcare Marketplace, and thus third party payment is not an option, programs must develop a process to reimburse members for monthly premiums. Reimbursements for health insurance premiums are considered taxable income for the member, and programs must have a way to document such reimbursements.

Programs should develop policies detailing how they will ensure members have health insurance coverage that is compliant with AmeriCorps Regulations. Sections of both the Member Handbook and the Member Service Agreement should address healthcare.

For further resources please see the following:

[2020 Terms and Conditions for AmeriCorps State & National Grants](#)

[AmeriCorps State and National Member Health Care Q&A](#)



## **20. Loan Forbearance**

AmeriCorps members who are earning a Segal AmeriCorps Education Award are uniquely eligible for one type of postponement of the repayment of their qualified student loan called forbearance. During the forbearance period, interest on the principle amount of the loan continues to accrue. If a member successfully completes their term of service and earns an Education Award, the National Service Trust will pay all or a portion of the interest that has accrued on the qualified student loans during this period. This accrued interest paid by the Trust, like the Segal AmeriCorps Education Award itself, is subject to income taxes.

AmeriCorps members enrolled in an AmeriCorps project are eligible for forbearance for most federally-backed student loans. For other types of student loans, members must ask their loan holder if their AmeriCorps service qualifies for a deferment or forbearance.

This postponement of the student loan payment (forbearance) is not automatic. Members must request it from their loan holders by completing the National Service Forbearance Request Form. Members may complete the Forbearance Request Form online by accessing their My AmeriCorps Portal.

The National Service Trust does not grant forbearances. Loan holders do. The Trust merely verifies membership in AmeriCorps and forwards the documents to the loan companies. The Trust is able to verify membership only when it has proof from a project that the individual is an AmeriCorps member.

### **Interest Accrual Payments**

AmeriCorps members who have earned a Segal AmeriCorps Education Award are eligible to have the Trust pay up to 100% of the interest that accrued on their qualified student loan during their service. To have the Trust pay all or a portion of the interest accrued on a qualified student loan, the Trust must receive verification from the Program indicating the member has completed their service and is eligible for an award. A member must log on to their account in My AmeriCorps. On the home page, they must click on the “Create Interest Accrual” link. The member must then follow the instructions, select the appropriate term of service and type of loan. Then, identify the holder of the student loan. Once the member follows these steps and clicks “submit,” a notice is sent electronically to their loan company. A record of the request will appear in the account home page. The loan holder certifies and submits the payment request electronically to the National Service Trust for payment.

For further information regarding Interest Accrual Payments, visit:

<http://www.nationalservice.gov/programs/americorps/segal-americorps-education-award/using-your-segal-education-award/postponing> .

### **Defaulted Loans**

Most student loans that are in default are not eligible for forbearance. If a member has loans that have gone into default before they begin their AmeriCorps service, they can attempt to negotiate an arrangement with the loan holder or collection agency to bring the loan out of default so forbearance can be granted and interest paid.

### **Public Service Loan Forgiveness**

The Public Service Loan Forgiveness (PSLF) Program is intended to encourage individuals to enter and continue to work full-time in public service jobs. Under this program, individuals may qualify for forgiveness of the remaining balance due on their William D. Ford Federal Direct Loan Program (Direct Loan Program) loans after they have made 120 qualifying payments on those loans while



employed full-time by certain public service employers. Full-time AmeriCorps terms of service count toward the public service employment requirements for this program.

For additional information please see the following resources:

[Federal Student Aid Public Service Loan Forgiveness Program Brochure](#)

[AmeriCorps Loan Forgiveness](#)

### **My AmeriCorps Portal**

In order to prevent a delay in the processing of interest payments, individuals must request payments electronically using our on-line system, My AmeriCorps. This is a secure, fast, and user friendly method for requesting interest payments to be remitted to your loan holders. It also provides electronic records of payments requested and paid and there are no forms to mail in.

AmeriCorps cannot guarantee the prompt and accurate processing of requests for interest payments using paper forms. Payments requested by paper can take up to six months or more for processing and are less secure.

It is fast and easy to access your National Service Participant account in My AmeriCorps. To register, go to <https://my.americorps.gov/mp/login.do> and click on “Register to create a new Member/Alum account” and follow the instructions.

## **21. Prohibited Activities**

AmeriCorps acknowledges that religious and political activities play a positive role in healthy communities, that religion and politics are defining characteristics of many community organizations (faith-based and secular), and that religious and political belief and action are central to many AmeriCorps members’ lives.

However, it is important that AmeriCorps programs and their members do not appear to be taking sides religiously or politically. Consequently, a number of limitations on the activities that AmeriCorps programs can support and in which members can engage while earning service hours, or when otherwise, representing AmeriCorps must be imposed. AmeriCorps members are free to pursue these activities on their own initiative, on non-AmeriCorps time, and using non-AmeriCorps funds.

The AmeriCorps logo should not be worn by members when participating in prohibited activities. While charging time to the AmeriCorps program, members accumulating service or training hours, or otherwise performing activities supported by the AmeriCorps program or AmeriCorps, staff and members may not engage in the following activities, and the grantee may not use grant funds to support the following activities:

- (1) Attempting to influence legislation;
- (2) Organizing or engaging in protests, petitions, boycotts, or strikes;
- (3) Assisting, promoting, or deterring union organizing;
- (4) Impairing existing contracts for services or collective bargaining agreements;
- (5) Engaging in partisan political activities, or other activities designed to influence the outcome of an election to any public office;
- (6) Participating in, or endorsing, events or activities that are likely to include advocacy for or against political parties, political platforms, political candidates, proposed legislation, or elected officials;

- (7) Engaging in religious instruction, conducting worship services, providing instruction as part of a program that includes mandatory religious instruction or worship, constructing or operating facilities devoted to religious instruction or worship, maintaining facilities primarily or inherently devoted to religious instruction or worship, or engaging in any form of religious proselytization;
- (8) Providing a direct benefit to—
  - (i) A business organized for profit;
  - (ii) A labor union;
  - (iii) A partisan political organization;
  - (iv) A nonprofit organization that fails to comply with the restrictions contained in section 501(c)(3) of the Internal Revenue Code of 1986 except that nothing in this section shall be construed to prevent participants from engaging in advocacy activities undertaken at their own initiative; and
  - (v) An organization engaged in the religious activities described in paragraph (g) of this section, unless AmeriCorps assistance is not used to support those religious activities;
- (9) Conducting a voter registration drive or using AmeriCorps funds to conduct a voter registration drive;
- (10) Providing abortion services or referrals for receipt of such services; and
- (11) Such other activities as the AmeriCorps may prohibit.

Individuals may exercise their rights as private citizens and may participate in the activities listed above on their initiative, on non-AmeriCorps time, and using non-AmeriCorps funds. Individuals should not wear the AmeriCorps logo while doing so.

## **22. Allowable Activities**

After reading the list of prohibited activities there may still be questions about what kind of service work can be credited to AmeriCorps Education Award hours.

**The most important piece of information to relay to the members is that at least 80% of their time must be spent doing direct service, of which 10% can be spent fundraising. The other 20% can be credited to education and/or training they receive that relates to their service or to AmeriCorps. This cap can be aggregated per member or per program but must be consistently applied.**

Direct service is work that addresses human need, the environment, public safety, and/or education in one form or another. It is working directly with people to make change, or doing work that is involved in making that direct change. It can be outreach, case management, training, teaching, tutoring, mediating, cleaning, counseling, recruiting volunteers, catching up on paperwork related to clients, preparing for class, coaching, listening, cooking, serving, providing health care, food, clothing, etc. Direct service hours should constitute 80% or more of an AmeriCorps member's total hours served. The remainder will be indirect service hours.

Indirect service hours, or education and training, hours are only applicable when they reflect the AmeriCorps service that the member credits to the education award he or she will receive. Any on-the-job training that refers to direct service would be part of this category. All orientations, including the AmeriCorps orientation, would be included, as well as any state or regional trainings, seminars, or workshops pertaining to issues related to direct service. Examples would be conflict resolution seminars, teacher development days, team-building exercises or a class on training techniques. Only 20% of the member's credited service hours can be dedicated to education and training, even if more hours have been spent in this area.

## **Fundraising Activities § [2520.40](#)**

AmeriCorps members may raise resources directly in support of your program's service activities.

Examples of fundraising activities AmeriCorps members may perform include, but are not limited to, the following:

- (1) Seeking donations of books from companies and individuals for a program in which volunteers teach children to read;
- (2) Writing a grant proposal to a foundation to secure resources to support the training of volunteers;
- (3) Securing supplies and equipment from the community to enable volunteers to help build houses for low-income individuals;
- (4) Securing financial resources from the community to assist in launching or expanding a program that provides social services to the members of the community and is delivered, in whole or in part, through the members of a community-based organization;
- (5) Seeking donations from alumni of the program for specific service projects being performed by current members.

AmeriCorps members may not engage in the below activities directly or indirectly by recruiting, training or managing others for the primary purpose of engaging in one of the activities listed below:

- (1) Raise funds for living allowances or for an organization's general (as opposed to project) operating expenses or endowment;
- (2) Write a grant application to AmeriCorps or to any other Federal agency.

## **23. Teleservice Policy**

The purpose of this policy is to provide the structure needed for effective implementation and operation of teleservice. Teleservice is a term used for AmeriCorps as it relates to “telework,” serving or working from home or off-site from the member’s normal service location where a supervisor is unable to physically be present to verify hours. CNCS strongly discourages teleservice, but there may be rare situations when it is appropriate.

### **General Requirements**

CNCS issued guidance on teleservice on January 19, 2017 titled “2017.01: AmeriCorps state and National Interim Guidance – Teleservice”. The guidance can be found the CNCS website. Below are highlights from the guidance

- Teleservice should be rare, if ever, and involve appropriate documentation, supervision and oversight.
- Teleserved activities must be within the scope and purpose of the grant and the activities contemplated in the grant application.
- In the unique situations in which a grantee determines that teleservice is appropriate the grantee should establish a policy addressing the following:
  - Written authorization for teleservice in advance,
  - Clear expectations of the nature, content, and frequency of communications requirements between supervisors and teleserving members,
  - Mitigation of the increased risk of time and attendance abuse,
  - Appropriate supervision including validation of the activities to be performed, and
  - Verification of hours claimed to include the supervisor reviewing whatever source of information was specified in the plan and document having done so,
  - Provide limitation on the total number of hours to be performed by teleservice on a single day, including required meal breaks.

- The grantee may need to update its insurance coverage to address legal liability attribution for incidents that occur during teleservice.

### **Teleservice Conditions**

Teleservice is authorized under the following unique conditions **that last longer than 3 days:**

- Inclement weather (i.e.: snowstorm which prevents members from going into worksite due to a school cancellation)
- Service site is closed for unforeseen circumstances (i.e.: school district site has a teacher strike)
- State or federal declared disaster impacting the member's service site

Teleservice is a privilege, not a right. A grantee can withdraw that privilege for mission-related purposes, if supervision becomes too burdensome or if hours cannot be validated.

It is encouraged that grantees review the Office of Inspector General report on teleservice for more information and context on teleservice issues:

[https://www.cncsoig.gov/sites/default/files/management\\_alert\\_teleworkfull.pdf](https://www.cncsoig.gov/sites/default/files/management_alert_teleworkfull.pdf).

Grantees with compliance-related questions should contact Serve Idaho.

## **Member Supervision**

### **1. Grievance Procedure**

All programs must establish a grievance procedure for members who believe that they have been unfairly released from the program and for other grievances filed by members or other interested parties. This grievance procedure should be attached to or part of the AmeriCorps member's service agreement. The procedure must include an opportunity for a hearing and binding arbitration within statutory deadlines. If the grievance alleges fraud or criminal activity, it must immediately be brought to the attention of AmeriCorps inspector general.

To ensure all AmeriCorps programs are in compliance with federal regulations regarding grievance procedures, member files will be reviewed during monitoring site visits to ensure members have signed a grievance policy. Programs will be notified in writing of any required changes and given an appropriate time frame to complete those revisions.

Additionally, the Commission encourages programs to establish an alternative dispute resolution procedure, such as mediation. While a member is going through the grievance procedure, be sure to make it very clear what stage they are in, what the time-line is, and what the next steps are (i.e. whether they are in a mediation, grievance hearing or binding arbitration).

The following illustrates the timeframe that **must** be addressed in an AmeriCorps grievance procedure.

### **Alternative dispute resolution**

(1) The aggrieved party may seek resolution through alternative means of dispute resolution such as mediation or facilitation. Dispute resolution proceedings must be initiated within 45 calendar days from the date of the alleged occurrence. At the initial session of the dispute resolution proceedings, the party must be advised in writing of his or her right to file a grievance and right to arbitration. If the matter is resolved, and a written agreement is reached, the party will agree to forego filing a grievance in the matter under consideration.

(2) If mediation, facilitation, or other dispute resolution processes are selected, the process must be aided by a neutral party who, with respect to an issue in controversy, functions specifically to aid the parties in resolving the matter through a mutually achieved and acceptable written agreement. The neutral party may not compel a resolution. Proceedings before the neutral party must be informal, and the rules of evidence will not apply. With the exception of a written and agreed upon dispute resolution agreement, the proceeding must be confidential.

### **Grievance procedure for unresolved complaints**

If the matter is not resolved within 30 calendar days from the date the informal dispute resolution process began, the neutral party must again inform the aggrieving party of his or her right to file a formal grievance. In the event an aggrieving party files a grievance, the neutral may not participate in the formal complaint process. In addition, no communication or proceedings of the informal dispute resolution process may be referred to or introduced into evidence at the grievance and arbitration hearing. Any decision by the neutral party is advisory and is not binding unless both parties agree.

### **Time limitations**

Except for a grievance that alleges fraud or criminal activity, a grievance must be made no later than one year after the date of the alleged occurrence. If a hearing is held on a grievance, it must be conducted no later than 30 calendar days after the filing of such grievance. A decision on any such grievance must be made no later than 60 calendar days after the filing of the grievance.

### **Arbitration**

#### **(1) Arbitrator**

(i) *Joint selection by parties.* If there is an adverse decision against the party who filed the grievance, or 60 calendar days after the filing of a grievance no decision has been reached, the filing party may submit the grievance to binding arbitration before a qualified arbitrator who is jointly selected and independent of the interested parties.

(ii) *Appointment by AmeriCorps.* If the parties cannot agree on an arbitrator within 15 calendar days after receiving a request from one of the grievance parties, AmeriCorps Chief Executive Officer will appoint an arbitrator from a list of qualified arbitrators.

#### **(2) Time Limits**

(i) *Proceedings.* An arbitration proceeding must be held no later than 45 calendar days after the request for arbitration, or, if the arbitrator is appointed by the Chief Executive Officer, the proceeding must occur no later than 30 calendar days after the arbitrator's appointment.

(ii) *Decision.* A decision must be made by the arbitrator no later than 30 calendar days after the date the arbitration proceeding begins.

#### **(3) The cost**

The cost of the arbitration proceeding must be divided evenly between the parties to the arbitration. If, however, a participant, labor organization, or other interested individual prevails under a binding arbitration proceeding, the State or local applicant that is a party to the grievance must pay the total cost of the proceeding and the attorney's fees of the prevailing party.

### **Suspension of placement**

If a grievance is filed regarding a proposed placement of a participant in a program that receives assistance under this chapter, such placement must not be made unless the placement is consistent with the resolution of the grievance.

## **Remedies**

Remedies for a grievance filed under a procedure established by a recipient of AmeriCorps assistance may include

- (1) Prohibition of a placement of a participant; and
- (2) In grievance cases where there is a violation of non-duplication or non-displacement requirements and the employer of the displaced employee is the recipient of AmeriCorps assistance
  - (i) Reinstatement of the employee to the position he or she held prior to the displacement;
  - (ii) Payment of lost wages and benefits;
  - (iii) Re-establishment of other relevant terms, conditions and privileges of employment; and
  - (iv) Any other equitable relief that is necessary to correct any violation of the non-duplication or non-displacement requirements or to make the displaced employee whole.

## **Suspension or termination of assistance**

AmeriCorps may suspend or terminate payments for assistance under this chapter.

## **Effect of noncompliance with arbitration**

A suit to enforce arbitration awards may be brought in any Federal district court having jurisdiction over the parties without regard to the amount in controversy or the parties' citizenship.

Serve Idaho will ensure that grievance procedures address each of the following required components:

- Grievance filed within one year of alleged occurrence.
- Grievance hearing within 30 calendar days of filing a grievance.
- Decision made within 60 calendar days of filing a grievance.
- Hearing by person not involved in previous decisions on the issue.
- Grievant can request binding arbitration if decision is adverse to grievant or if decision is not reached within 60 calendar days.
- Binding arbitration hearing is held within 45 days after request for arbitration or within 30 days after CEO appoints arbitrator.
- There is a decision within 30 days of the binding arbitration hearing.
- Remedies include the applicant's selection or reinstatement and other changes in the terms and conditions of service.

## **The programs are accountable for making any needed revisions in their grievance procedure.**

In formatting your own grievance procedure please see the AmeriCorps Provisions to make sure your grievance procedure follows appropriate guidelines.

**NOTE:** Programs are **required** to contact Serve Idaho if a member starts a grievance procedure process. The written grievance should be sent to Serve Idaho and any correspondence with the member should also be included.

## 2. Drug-Free Workplace

In accordance with the AmeriCorps Provisions, programs are required to give notice about the Drug-Free Workplace Act to members and to conduct a drug-free awareness program. If a member is arrested for or convicted of a drug offense, he or she must notify the Program Director in writing within five (5) days. Appropriate action must be taken including suspension and referral to a drug rehabilitation program, or release for cause consistent with AmeriCorps rule on termination and suspension of service. The conviction **must be reported to Serve Idaho**, in writing, within ten (10) days. Serve Idaho will then notify AmeriCorps in writing.

## 3. Wage Garnishment

Any type of garnishment of the federal portion of a member's living allowance is not permitted due to issues of sovereign immunity. Sovereign immunity protects the property interests of the United States from suits to which it has not consented. The federal government has a continuing property interest in AmeriCorps grant funds until they are expended in accordance with the grant's terms. With respect to the living allowance, AmeriCorps has a property interest in the federal share of the member's living allowance, until the AmeriCorps member actually receives it, and this property interest is protected by sovereign immunity. Only Congress may waive this immunity.

Whether or not the non-federal portion of the living allowance—i.e. the funds provided as match at the program level—is subject to garnishment is a state law issue. Because AmeriCorps is not a party to this action, and because it involves application of state law, programs should consult their own local counsel.

## 4. Member Timesheets

Serve Idaho will conduct random reviews of member timesheets throughout the program year. If problems are found during the initial review such as inconsistent calculations, unauthorized timesheets, prohibited activities, etc., it will be considered a compliance issue and may require a complete review of all member timesheets.

The review of timesheets will include the following:

- Is the timesheet signed by the member after the last date of entry?
- Is the timesheet signed by the site supervisor after the member?
- Is the timesheet signed by the program director after the site supervisor?
- Does the timesheet have the appropriate approvals marked?
- Are members on target to attain their intended number of service hours?
- Are service activities listed on timesheets in line with the approved objectives and are not prohibited activities?
- Do the timesheets clearly track the service activities to ensure adherence to the 20% rule relating to training?
- Do the timesheets clearly track the service activities to ensure adherence to the 10% rule relating to fundraising?
- Are timesheets current?

# Public Assistance Programs

## 1. Food Stamps

A member's food stamp benefits are not affected because a member receives the AmeriCorps living allowance. This means that a member's benefits should not be decreased, increased, or terminated because he or she receives the living allowance. This is a federal rule and is the same in all states.

Visit: <http://healthandwelfare.idaho.gov/FoodCashAssistance/FoodStamps/tabid/90/Default.aspx>

for information regarding food stamp benefits. More information regarding food stamp benefits can be found on the member Basecamp.

## 2. Public Housing

AmeriCorps members' benefits do not affect a member's eligibility for federal, need-based housing assistance, such as Section 8 housing and other federally subsidized housing. This means that the living stipend cannot be taken into consideration when a member applies for or if a member's eligibility for public housing is being re-examined. This is a federal rule and is the same in all states. You can find HUD Income Exclusions on Basecamp.

## 3. Unemployment Benefits

AmeriCorps members are **not entitled** to unemployment benefits. AmeriCorps has interpreted federal legislation to mean that there is no employer-employee relationship between members and programs. Programs are not required to pay unemployment taxes.

## 4. Temporary Assistance to Needy Families (TANF)

Temporary Assistance for Needy Families (TANF) is a block grant program provided under the Social Security Act (SSA). Because TANF is under the SSA, the AmeriCorps State and National living allowance may be considered income for the purposes of determining eligibility for and the amount of aid under TANF. Visit

<http://www.healthandwelfare.idaho.gov/FoodCashAssistance/CashAssistance/CashAssistanceforFamilies/tabid/172/Default.aspx> for information regarding TANF.

## 5. Supplemental Social Security

Supplemental Security Income (SSI) is a federal program that provides a monthly cash benefit to low-income individuals who are aged, blind, or who have a disability. Prior to the passage of the Heroes Earnings and Relief Tax Act of 2008 (HEART Act), receiving an AmeriCorps living allowance could disqualify an individual from eligibility. Under the HEART Act, the Social Security Administration will ignore an individual's receipt of AmeriCorps benefits for purposes of SSI eligibility. The Heart Act excludes "any benefit (whether cash or in-kind)" and so covers the living allowance, health insurance, child care, and the education award (and related interest payments).

Additionally, SSI recipients who serve in AmeriCorps State and National and National Civilian Community Corps automatically qualify for the Student Child Earned Income Exclusion if they meet applicable age and marital status requirements.

SSI recipients who are (1) under the age of 22 regularly attending school and (2) neither married nor the head of a household are eligible for the student earned income exclusion, which excludes from countable earned income \$783 per month and up to \$9,407.82 per year (amounts effective January 2020). This exclusion may be combined with existing SSI work incentives and other income disregard rules, which should encourage more young people with disabilities to participate in AmeriCorps State and National and NCCC.



Note that the Student Child Earned Income Exclusion policy change does not affect AmeriCorps VISTA members, whose benefits are already fully excluded from income under section 404 of the Domestic Volunteer Service Act.

Any portion of an education award used by an SSI recipient to pay for tuition, fees, and other necessary education expenses (not including room and board, or repaying student loans) will not count as income. Any portion of the education award that is not used for tuition, fees, or other necessary educational expenses counts as income in the month that it is used. For general questions about SSI or the terms used in this answer, go to <http://www.socialsecurity.gov/ssi/index.htm>.

## Reporting and Records Retention

**Financial Management Provisions, Administrative Costs, Liability Insurance Coverage, and Termination of the Grant** – Please refer to the AmeriCorps Provisions.

### 1. Match

*Due to COVID-19, CNCS issued a match waiver for the 2020-2021 program year. Regulatory match percentage and budgeted match percentage will both be monitored throughout the program year. Match not required per CNCS authority to issue a blanket waiver under 42 U.S.C. § 12571(e)(4) and consistent with 45 CFR 2521.70.*

Programs that are not meeting proposed levels of match at the end of a quarter should include the following comments in their Periodic Expense Report (PER) and Federal Financial Report (FFR):

- An explanation as to why match was not met, and
- Plans to meet match the next quarter.

Programs that do not meet match requirements and do not include comments in their PER and FFR reports will be required to submit a letter addressing the two issues noted above.

AmeriCorps funds may be reduced by Serve Idaho for failure to meet the minimum match requirements.

Cash or in-kind matching contributions that exceed the required minimum (regulatory amount) will be considered voluntary cost share. Programs that cannot meet the amount of voluntary cost share (budgeted amount) proposed in their application must submit to Serve Idaho:

1. An email explaining why the budgeted cost share cannot be met.
- 2.

The cost share/match cannot be reduced below the minimum percentage requirements as indicated below:

### Overall Cost Match

Subject to the requirements of § [2521.45](#), your overall share of program costs will increase as of the fourth consecutive year that you receive a grant, according to the timetable below:

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Minimum Overall Share</b>	24%	24%	24%	26%	30%	34%	38%	42%	46%	50%

The program must have contributed matching resources by the end of a grant period in an amount equal to the combined total of the proposed or minimum overall annual match for each year of the grant period.

### Alternative Match

If your program is unable to meet the match requirements and is located in a rural or a severely economically distressed community, you may apply to AmeriCorps for a waiver that would require you to increase the overall amount of your share of program costs beginning in the seventh consecutive year that you receive a grant. Contact Serve Idaho if you believe you meet the requirements and are interested in applying. If you receive the alternative match you will follow the timetable below:

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Minimum Overall Share</b>	NA	NA	NA	NA	NA	NA	29%	31%	33%	35%

### Administration Cost Match

Programs may bill a maximum 5.26% of the Corporation funds actually expended in the operation of the program to the administration line of the budget. However, Serve Idaho will retain 1.05% of the federal funds available to programs for administrative costs. The calculations are as follows:

#### 1. To Determine the CNCS Share:

$[(\text{Section I CNCS}) + (\text{Section II CNCS}) \times 0.0526] \times (0.80) = \text{Corporation fixed amount}$

$[(\text{Section I CNCS}) + (\text{Section II CNCS}) \times 0.0526] \times (0.20) = \text{Commission fixed amount}$

#### 2. To determine the Grantee share:

$[\text{Total amount of Section I}] + [\text{Total amount of Section II}] \times .10 = \text{Corporation fixed amount}$

**The Commission fixed amount for the grantee share will be \$0**

Serve Idaho will check the administrative cost calculations with each submitted draw down request. If the 5.26% or 10% is exceeded an adjustment in My Service Log and the draw request will be required before the draw down request is processed.

### Federal Indirect Cost Match

If you have a federally approved indirect cost rate, the rate will constitute documentation of your administrative costs, including the 5% maximum payable by AmeriCorps. Specify the Cost Type for which your organization has current documentation on file, i.e., Provisional, Predetermined, Fixed, or Final indirect cost rate. Supply your approved IDC rate (percentage) and the base upon which this rate is calculated (direct salaries, salaries and fringe benefits, etc.).

**1. Determine the base amount of direct costs to which you will apply the IDC rate, including both the CNCS and Grantee shares, as prescribed by your established rate agreement (i.e., based on salaries and benefits, total direct costs, or other). Then multiply the appropriate direct costs by the rate being claimed. This will determine the total amount of indirect costs allowable under the grant.**

**2. To determine the CNCS share: Multiply the sum of the CNCS funding share in Sections I and II by 0.0526. This is the maximum amount you can claim as the CNCS share of indirect costs.**

**3. To determine the Grantee share: Subtract the amount calculated in step 1 (the CNCS administrative share) from the amount calculated in step 2 (the Indirect Cost total). This is the amount the applicant can claim as grantee share for administrative costs.**

## **2. Budget Modifications**

Serve Idaho understands that AmeriCorps programs must sometimes modify their budget during the program year. These budget modification guidelines summarize the AmeriCorps Provisions on this issue. They are intended only as guidance and are not a substitute for the Provisions or other federal rules and regulations. For more information, please refer to the AmeriCorps Provisions.

### **Line Item Changes**

Programs may move funds between line items if the amount moved is less than 10% of the total grant award. Keep in mind that *any budget modification must be approved by Serve Idaho before they are considered effective*. For example, a program whose total grant budget is \$100,000 may move up to \$10,000 between line items without approval from AmeriCorps. *However, the program must receive approval from Serve Idaho*. If a program needs to move over 10% of the total award the budget modification will need to be approved by AmeriCorps.

### **Budget Modification Procedure**

All changes to an approved AmeriCorps budget require approval by Serve Idaho as described below. The following procedures should be followed for any revisions to the approved budget.

### **Policy Guidance:**

Programs may reallocate funds within individual sections of the budget up to 10% of the section subtotal without prior approval by Serve Idaho. The following exceptions require prior written approval from Serve Idaho:

- All budget revisions in Section II, Member Support Costs
- All budget reductions in Section I, “Member Training and Education”
- All budget revisions in Section I, Staff Salaries
- All budget revisions in Section I, “AmeriCorps Sponsored Meetings”

The following circumstances require prior written approval from CNCS:

- Specific costs requiring approval under the OMB super circular,
- Purchases of equipment over \$5,000 unless in approved application and budget,
- Adding a line item.

**Programs should allow 3 weeks for action on budget revisions requiring prior written approval.** Program staff may be contacted to clarify information. Requests beyond the approval authority of Serve Idaho will be forwarded to the Senior Portfolio Manager at the AmeriCorps Regional Office for final approval. **Please allow four weeks for response from AmeriCorps.**

Programs must submit a budget revision worksheet within 30 days of any changes to the approved budget with a written narrative describing the changes. Budget revisions must be in compliance with all grant guidelines and restrictions. Further guidance is available in the AmeriCorps provisions. Contact Serve Idaho’s Grants and Contracts Officer for clarification of guidelines.

## Procedure

1. Complete a revision request spreadsheet.
2. Draft a narrative to describe the nature of the requested changes.
3. Submit the spreadsheet and narrative to Serve Idaho for consideration.
4. **Allow 3 weeks for approval** (if approval is required).
5. Maintain copy of revision spreadsheet signed by Serve Idaho staff.
6. Adjust internal records as necessary.

## Serve Idaho Budget Revision Worksheet Instructions:

1. Request an electronic version of the worksheet from Serve Idaho
2. Enter desired changes to the budget in the columns titled "Revision."  
Enter the amount you want to add or subtract from a particular line item, for instance:  
The original award shows \$2,000 in the Travel line item and \$4,500 in Equipment;  
and you want to move \$500 out of Equipment and into Travel, you would enter \$500 in the "Revision" column under Travel and -\$500 under Equipment)
3. Totals will automatically be calculated based on revisions
4. Print completed form, sign and date and forward to Serve Idaho's Grants and Contracts Officer **with narrative describing the requested changes**. Narrative should be on official letterhead and include how much money is being moved from which line item to which line item; why there was an excess of funds in the line item from which money is being moved; why funds are needed in the line item to which money is being moved.

## Approval Authority:

Authority for revisions to an AmeriCorps program budget is as follows:

1. Total of any and all budgetary changes in any single Section of the original approved budget in the Corporation Share, *less than or equal to 10% of that section subtotal*: **Program Director**
2. Total of any and all budgetary changes in the original approved budget, *less than or equal to 10% of total budget*: **Serve Idaho Grants and Contracts Officer**
3. Total of any and all budgetary changes in the original approved budget that push the cumulative budget changes for the year for the entire formula prime over 10%, revisions to purchase equipment over \$5,000, specific costs requiring prior approval before incurrence under the uniform administrative requirement, cost principles, and audit requirements for Federal awards at [2 CFR PRTS 200](#) and [2205](#):  
**AmeriCorps Regional Senior Portfolio Manager.**

**Programs should not consider budget modification requests approved until written notice is received from Serve Idaho.**

## Sub-granting Funds

Programs must receive prior approval from Serve Idaho and AmeriCorps to sub-grant or subcontract program activities not previously approved in the application for funding. Programs must receive prior approval from both Serve Idaho and AmeriCorps transfer the grant or to sub-grant to a different organization. For more information, please refer to the AmeriCorps Provisions.

## Equipment

Programs may not purchase equipment costing more than \$5,000 with grant funds unless specified in the approved budget or application without prior approval from Serve Idaho and AmeriCorps. All purchases of equipment and supplies should be handled in accordance with OMB standards. For

more information, please refer to the AmeriCorps Provisions.

### 3. No Cost Extensions

A no cost extension occurs when a grantee's budget end date is changed to an agreed upon later date without any increase to the grant budget (no additional funds are granted). Typically, no cost extensions are granted to allow a member to finish their term of service when they have had an extenuating circumstance that prevents them from completing their term of service within the originally allotted time frame. Examples include illness, surgery, hospitalization etc.

The grantee should complete the No-Cost Extension Request form and submit the requested information for consideration to the Serve Idaho Grants and Contracts Officer at least 45 calendar days before the original budget period end date.

Programs may not enter into commitments with members, contractors, or other individuals or organizations that would cause costs to be incurred beyond the budget period end date prior to receiving Serve Idaho approval.

Submission of a request for an extension is not a guarantee that the request will be approved.

Once all requested documentation is submitted and received by Serve Idaho, it will be thoroughly reviewed. **Grantees should be in contact with Serve Idaho as soon as the potential need to request a no cost extension is identified.** No cost extension requests are not considered official requests and will not be reviewed until the no cost extension form has been submitted to the Serve Idaho office with signatures.

Serve Idaho has a budget period end date with AmeriCorps). If a grantee's requested new end date will take Serve Idaho beyond Serve Idaho's budget period end date with AmeriCorps then the request must be approved by AmeriCorps before it is approved by Serve Idaho.

A request for a no cost extension after the grantee's budget period end date has passed will not be approved under any circumstances. No Cost Extension forms can be found on Basecamp.

### 4. Fiscal Reports and Draw Request

#### Periodic Expense Reports (PER's)

The PER's are due to Serve Idaho on a monthly or quarterly basis. This will need to be established at the beginning of the grant year, so it can be entered into My Service Log correctly. If a change needs to be made to the reporting period, contact Serve Idaho's Grants and Contracts Officer. The Grants and Contracts Officer will need to approve the change and make the adjustment to the reporting period in My Service Log. The PER's will be due on or before the 15<sup>th</sup> of the month. Should the 15<sup>th</sup> fall on a weekend, the reports are due the Friday prior to the weekend. If the program cannot meet this deadline contact Serve Idaho's Grants and Contracts Officer.

Serve Idaho will issue a reimbursement payment based on timely monthly/quarterly expense reports submitted by programs. The monthly/quarterly payments will result in year-to-date payments being equal to year-to-date reported expenditures by program. Failure to report monthly/quarterly expenditures by the due date will result in a delay in issuing reimbursement payments. If you experience technical difficulties reporting in My Service Log, please contact the Grants and Contracts Officer.

### **Submitting a Periodic Expense Report**

1. In My Service Log, select AmeriCorps Financial Report.
2. From the AmeriCorps Financial Report drop down menu (located on the upper left), choose the program year.
3. From the Available action drop down menu (located on the upper right), choose Initialize next report.
4. Fill in the CNCS share and the Grantee Share of expenditures for the month or quarter.
5. From the available actions drop down menu, choose complete.
6. If another person in your organization approves the PER, have them review the PER and select approve periodic expense report and submit to Serve Idaho from the available action drop down menu.

**Be sure to only include incurred expenses and in-kind match that are captured in your accounting system for that reporting period.** Also, make sure you have calculated Section 3. Administrative Costs correctly (see pg. 53 for guidance).

### **Cost Reimbursement Grant Draw Request**

These procedures detail the process for reimbursement of expenditures incurred by programs of Serve Idaho for AmeriCorps grants. Serve Idaho utilizes periodic expense reports (PER) to verify the amounts and types of expenditures reported as allowable costs by programs. Information on expense reports must be supported by source documentation and in the organization's general ledger. Serve Idaho staff will review sub-grantee records during monitoring visits or by other means to ensure compliance with all federal and state guidelines. Sub-grantees must maintain clear documentation of all expenditures and match donations to support information reported on financial statements.

#### **Procedure:**

1. The Program's Financial Director will complete a Periodic Expense Report (PER) on My Service Log and save it as completed.
2. The Program Director should review the PER and save it as approved periodic expense report and submit to Serve Idaho (*only send to Serve Idaho if information on PER is accurate and complete*).
3. Financial Director should prepare, sign and submit a Subgrantee Financial Status Report (FSR) to Serve Idaho (*requested amount must directly correspond to the current expenses shown in the completed PER*).
4. Serve Idaho will process the request, reconcile any discrepancies or questions and forward the request to Department of Labor (IDOL) fiscal staff for payment.
5. Payment will be issued via check or direct deposit. (*Allow 3 weeks from receipt of signed request by Serve Idaho*).

#### **Considerations:**

- Programs may only request reimbursement for expenses incurred.
- Programs should report match and in-kind donations in the quarter they are received and/or applied to the grant.
- Serve Idaho may request additional supporting documentation for any draw down request prior to processing.
- Programs must meet the approved match each quarter unless otherwise waived by Serve Idaho.

The draw request form can be found on Basecamp.

### **Fixed Amount Grant Draw Request**

For full-cost fixed amount grants, the program must ensure they do not request more funds from the Commission than they are entitled to draw based on members enrolled. The program may request funds on a monthly or quarterly basis throughout the year. Reconciliation will occur in the final month to ensure the subgrantee does not draw funds in excess of member hours served. Funds can be requested on a monthly or quarterly basis which will be determined at the start of the grant period. Draws will be based on the total number of hours served by the members during the time period for which the draw is being submitted.

The draw request is due on or before the 15<sup>th</sup> of the month and must include:

1. The Fixed Amount Monthly Reimbursement Excel
2. Member Eligibility Certification Form (for any month in which new member enrollments occur)

Fixed Amount Grant Draw request forms can be accessed on Basecamp.

### **Federal Financial Reports (FFRs)**

FFRs are financial status reports used by AmeriCorps to monitor sub-grantee spending. FFRs are cumulative over the space of the prime grant, typically three years. Programs must submit Federal Financial Reports (FFRs) to Serve Idaho every six months.

### **The FFR and Program Income**

The FFR includes data fields to report program income that programs earn in excess of income earned that is used to meet the program share of expenditures.

FFR Forms can be accessed on Basecamp

### **Other Federal Funds Reporting Requirement**

The Kennedy Serve America Act added a requirement for AmeriCorps program grantees to report the amounts and sources of federal funds, other than those provided by AmeriCorps, used to carry out their programs. This includes other federal funds expended by programs and operating sites. You may need to amend your site agreements to specify this required information collection.

This will be an annual reporting requirement for amounts expended over the prior 12 months and will be reported with the October FFR on the Other Federal Funds Spreadsheet.

The other federal funds reporting requirements are effective with FFRs due in October 2020, for the reporting period ending September 30, 2020. Programs can access the other federal funds spreadsheet on Basecamp.

## **5. Progress Reports**

The completed GPR/PROGRESS REPORT includes information on: progress toward performance measures, member and volunteer hours, program challenges, etc. The October GPR/Progress Report is a cumulative report and a separate word document is used for this report. Serve Idaho will send the GPR/Progress report template quarterly with a reminder of the due date.

Programs can access GRP/Progress report templates and instructions on Basecamp.

## 6. Member Reporting – My AmeriCorps Portal

Programs need to know what is required of program/sites in terms of member data collection in order to monitor that they have met their reporting requirements. The specific CNCS rules as to when some of these forms must be completed are shown in the table below:

<b>MEMBER FORM</b>	<b>DEADLINE</b>
Member Information Profiles	Must be completed before enrollment can be created
Member Enrollment Forms	Within 8 calendar days of enrollment
Change of Term/Status Forms	Within 5 calendar days of change
Member Exit Form	Within 30 calendar days of exit
Member Time Logs	Complete and accurate on a monthly basis

The enrollment, exit and change of status forms are created through the member's My AmeriCorps Portal and approved by Program staff. It is important that member forms are completed in a timely manner. Timely completion could also play a role in future grant funding decisions, especially for competitively awarded funds.

Time logs track hours served by members in direct service, fundraising and training. (Note: member training hours can be no more than 20% either per person or averaged across all members. Member fundraising hours may be no more than 10% per person or averaged across all members.) Time logs need to be completed on a regular basis in order to ensure the program/site is tracking member hours accurately.

My AmeriCorps and My Service Log have tools to help programs monitor member progress. These tools can identify members who are falling behind and at risk of not being able to complete their required number of hours of service to earn an education award before the end of the program year.

## 7. Sustainability

### General Overview

Serve Idaho defines “sustainability” as a plan that, through an organization's use of various resources, will provide for a stronger infrastructure, stronger programs, and community self-sufficiency in regards to supporting the needs of its constituents, its financial health, and its ability to be well managed and accountable.

### Sustainability Policy

Programs must also follow the Sustainability Policy. Each program is required to gradually decrease reliance on federal funds, while continuing to meet the minimum match requirements. More information on these topics may be found in the AmeriCorps Provisions.

### Policy Guidelines

AmeriCorps has published increasing match requirements for all AmeriCorps programs (see page 52).

Under this policy, each program is required to gradually decrease its reliance on federal funds, yet still meet the Overall Minimum Match requirements. By either cash or in-kind matches in any category, programs must reach the required match level each year.



Please note that AmeriCorps has created an alternative match requirement for grantees located in either a rural or a severely economically distressed area prior to submitting their grant application. For additional information on the alternative match contact Serve Idaho's Program Manager or Grants and Contracts Officer.

### **Intent of the sustainability policy**

The intent of the policy on sustainability is to decrease program dependency on federal funds, to ensure services provided by AmeriCorps members will continue if federal funding discontinues, and to make more funding available to support new programs. Each program should put together a written sustainability plan and track the progress made each year.

The Commission will provide assistance to programs in the area of sustainability by sponsoring additional training and technical assistance on collaborations and partnerships, leadership, and fundraising, as needed.

## **8. Record Retention**

All financial records, supporting documentation, statistical records, evaluation and performance data, member information, and personnel records must be retained for at least three years after the close of the AmeriCorps grant or until Serve Idaho provides written notification that grant files can be destroyed, whichever period is longer.

If any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of the 3-year period, the records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular 3-year period, whichever is later.

## **Program Monitoring and Evaluation**

### **1. Purpose of Monitoring**

State Service Commissions and National Programs face many challenges in administering AmeriCorps programs. Limited staff capacity, as well as unusual program models, can make monitoring and management particularly difficult. As stewards of public funding, Serve Idaho needs to ensure that the programs and sites they fund are aware of their contractual requirements and are in compliance with all of the rules, regulations, and provisions governing AmeriCorps funds. To accomplish this, Serve Idaho's Grants and Contracts Officer must create adequate systems for monitoring program/sites that are fully implemented and available in writing.

### **Components of a Monitoring Strategy**

An adequate monitoring strategy features an array of oversight of program/sites, including:

- Document Review
- Compliance Reviews
- Program Quality and Performance Reviews
- Special Audits or Surveys
- One-on-one technical assistance to resolve any issues

In addition, all programs with high-risk, determined by the Risk Assessment Tool, will receive additional visits from Serve Idaho.

This policy will help to ensure high quality AmeriCorps programs are implemented while maximizing staff time and meeting the recommendations of the Inspector General in regards to program monitoring.

## **2. Program Risk Assessment**

Program risk assessments are used to allow Serve Idaho to effectively monitor compliance and progress of AmeriCorps State programs in Idaho and to provide an adequate level of both on-site and off-site technical assistance based on the systematically assessed capacity of programs to administer the AmeriCorps Program.

### **Procedure**

Each Idaho AmeriCorps program will be analyzed and assigned a risk category at or near the end of a grant period. The monitoring strategy specifically addresses issues contributing to the assigned risk category for each program, which may include issues other than those specifically listed in the Risk Assessment Worksheet found on Basecamp. The overall monitoring strategy will allow for the most time-intensive monitoring of the highest risk projects, with less time-intensive monitoring strategies applied, as appropriate, to lower risk projects.

### **Risk Assessment**

On at least an annual basis (late summer/early fall or as new programs are funded) Serve Idaho staff will assess the risk associated with each program using the Program Risk Assessment worksheet found on Basecamp. on this risk assessment, Serve Idaho staff will draft a monitoring/site visit plan for each grantee as appropriate to the identified risk factors and risk categories outlined below.

This worksheet will also be provided to the review panel during the grant application review process. **Those programs in their first year, which have not completed half a year or more, will automatically be scored as medium risk, unless other factors move them into a high risk category. If they are considered high risk, Serve Idaho staff will provide written documentation to the Program Committee stating what factors put them in this category.**

## **3. Monitoring/Site Visits**

In general, the Grants and Contracts Officer (and Commission members or other staff, as appropriate) will meet with members, site supervisors or other stakeholders to discuss the program. When possible, members will be observed in service. Serve Idaho acknowledges that issues such as confidentiality may prevent this. Serve Idaho will try to obtain as much information as possible about program activities and services in order to identify best practices or areas for improvement.

A programmatic and fiscal site visit may be made to every grantee or site one time per grant cycle, one time per year, or more often as may be appropriate. For brand new programs, an in-person visit will occur in the Fall of the new grant year to go over processes and to make sure that internal controls are set up and working well for the new program. The purpose of these visits is to assess the program's compliance with federal regulations and to help the program improve systems to pass an OIG audit. Member files, program policies, data logs, criminal history checks and fiscal records will be reviewed throughout the year upon the request of the Grants Officer. On-site monitoring will focus on interviewing and shadowing members and site supervisors and providing program specific training and technical assistance. The AmeriCorps Program Review

Instruments will be used to assess program compliance.

At least a week before the in-person site visits, Serve Idaho will send out the agenda and any other documentation needed for the site visit. The results of the visit will be reviewed with program staff at the end of the visit. A site visit feedback letter will be sent to the program within a two week period and should include only those issues discussed during the visit.

### **Desk-Based Monitoring**

While an on-site monitoring visit can provide a valuable, direct view of program operations, it is a resource-intensive form of monitoring. Desk-based monitoring is more sparing of scarce resources of staff time and money and, properly used, can actually forestall the need for more intensive intervention later on to resolve grantee problems. The Grants Officer will have a rolling calendar throughout the year to be able to check member timesheets, criminal history checks, etc. There may be times when further documentation will be needed from the program. The Grants Officer will notify the program and give them **two weeks** to supply the necessary documentation.

Serve Idaho will utilize My Service Log and eGrants as an effective management and monitoring tool. For instance, through My Service Log and eGrants, it is possible to:

- Review member timesheets,
- Review each program/site's progress on member recruitment and retention,
- Track member progress toward completing service hours,
- Check timeliness of reporting, including member forms, progress reports, and financial reports,
- Conduct member enrollment queries.
- Review specific line items from Periodic Expense Report.

Monitoring can have many purposes, some of the most important of which are summarized in the table below:

<b>Learning</b>	Finding out about AmeriCorps program service activities and community partners
<b>Publicity</b>	Hearing success stories
<b>Compliance</b>	Assuring that all federal, state, local, contractual, and organization-specific regulations, policies, and provisions are being followed
<b>Monitoring Progress</b>	Comparing actual outputs and outcomes to the performance measures outlined in a program's contract
<b>Technical Assistance</b>	To improve overall quality of the program

The AmeriCorps program review instruments for in-person visits to be completed are as follows:

### **Pre Visit Checklist**

This checklist will be completed before the site visit. Any important issues or concerns identified during the review will be discussed with the program.

### **Financial Compliance**

Once every three years, an in-depth fiscal review will be completed by Serve Idaho's Grants and Contracts Officer. The majority of this part of the site visit will be completed with the assistance of the program's fiscal staff, but some questions will most likely be answered by program staff.

Programs should have copies of their Periodic Expense Reports (PER's) and Federal Financial Reports (FFR's) available when the site visit review takes place. A copy of the program's original budget should also be available. In general, a program must have all required backup documentations for each AmeriCorps and Grantee share expenditure reported on their PER's and FFR's. The in-person financial site visit will look at the following documentation:

- Match
- Receipts for Grant Expenditures
- Internal Controls Systems
- Accounting Systems
- Payroll System
- A-133 Audit (if applicable)

### **Programmatic Compliance**

Once every three years, an in-depth programmatic review will be completed by Serve Idaho's Grants and Contracts Officer. The Program Director and staff (if appropriate) will need to be available.

Written documentation and/or proof of compliance are necessary in case of an audit and need to be provided during the site visit. Programs should have written policies and procedures and documentation needs to be readily accessible. Programs will be required to submit their policies and procedures to Serve Idaho every 3 years.

Serve Idaho's Grants Officer will send programs a site visit letter following their in-person site visit or after a desk monitoring item. Once the program receives their site visit letter, they have 30 days to address compliance items listed in the letter (other than initiating needed criminal history checks). Failure to address compliance items within this timeframe can result in a hold on reimbursement requests.

### **Review Outcome**

After the monitoring visit is complete, the Grants and Contracts Officer will provide written feedback related to the review. The monitoring review will be used to determine if additional site visits are necessary and may impact a program's renewal application and ability to access additional training.

### **High-Risk Programs**

If a program is considered high-risk, they will have more than one site visit. The agenda will be determined by the reason for the visit. For example, the agenda for a visit that is being held because of a change in program director will focus on expectations of programs, AmeriCorps regulations and relationship building. The agenda for a visit that is being conducted because of concerns regarding prohibited activities will focus on meeting with members, site supervisors, and program staff to assess whether prohibited activities were taking place and to ensure prohibited activities do not occur in the future. A site visit feedback letter will serve as written documentation of what occurred during the visit.

High-risk factors may include, but are not limited to:

- A change in program director or other key staff,
- Legitimate member complaints to Serve Idaho,
- Poor past performance by the program (based on progress reports and/or previous site visits),
- Concerns regarding prohibited activities,
- Compliance with reporting deadlines,

- Financial compliance issues.

### **Monitoring Checklist**

In general, it is expected that program staff will monitor grantees and sites to examine the following:

#### **Member Documentation**

- AmeriCorps Application,
- Determination of Eligibility,
- Background Checks,
- Accompaniment Forms (if applicable),
- Retention Statistics (end of term/exit, change of status/term, terms of release),
- Hours Worked and Timesheets,
- Training Received,
- Benefits (child care, health care, etc.),
- Member Service Agreements,
- Position Descriptions,
- Performance Evaluations (at least mid-year and end of year for full-time members; end of term only for less than full-time members).

#### **Program Documentation**

- Grievance Procedures,
- Prohibited Activities,
- Staff Timesheets,
- Progress Toward Meeting Performance Measure Targets,
- Measurement Tools,
- Use of My Service Log,
- National Identity (signage, uniforms, published materials),
- Mechanism for Community Input and Collaboration,
- Subcontracts or Host Site Agreements (if applicable).

## **4. Subgrantee Monitoring Responsibilities**

Each subgrantee must have and implement a plan for oversight and monitoring to ensure that its subgrantees and/or service locations have agreed to comply and are complying with the current AmeriCorps State and National Grant Provisions and other relevant grant requirements. This plan should include policies and procedures on training, oversight and monitoring of program's subgrantees and/or service locations.

## **5. Grant Closeout**

Programs shall submit, within 60 calendar days after the date of completion of the award, all financial, performance, and other reports as required by the terms and conditions of the award. The Federal awarding agency may approve extensions when requested by the recipient.

Unless the Federal awarding agency authorizes an extension, a recipient shall liquidate all obligations incurred under the award no later than 60 calendar days after the funding period or the date of completion as specified in the terms and conditions of the award or in agency implementing instructions.

The federal awarding agency shall make prompt payments to a program for allowable reimbursable

costs under the award being closed out.

The program shall promptly refund any balances of unobligated cash that Serve Idaho has advanced or paid and that are not authorized to be retained by the recipient for use in other projects. OMB governs unreturned amounts that become delinquent debts.

When authorized by the terms and conditions of the award, Serve Idaho shall make a settlement for any upward or downward adjustments to the Federal share of costs after closeout reports are received.

The program shall account for any real and personal property acquired with Federal funds or received from the Federal Government.

In the event a final audit has not been performed prior to the closeout of an award, Serve Idaho shall retain the right to recover an appropriate amount after fully considering the recommendations on disallowed costs resulting from the final audit.

### **Serve Idaho Closeout Requirements**

Serve Idaho will send a closeout letter to our Formula and Competitive programs at the end of our three year grant cycle. If the program does not re-apply for AmeriCorps funding, or the Commission chooses not to renew their grant, they will receive a closeout letter. After the program receives the closeout letter they will need to provide the following:

1. Final Progress Report,
2. Final FFR that is cumulative over the entire project period,
3. **Inventory of Equipment** (\$5,000 or over, unused supplies with an aggregate value greater than \$5,000 purchased with grant funds) –
4. **Inventory of residual supplies –**

If the program will not be able to meet the overall match they must request a waiver prior to the closeout of the grant.

Inventory of equipment and inventory of residual supplies forms can be accessed on Basecamp.

## **6. PROGRAM EVALUATION**

As articulated in the AmeriCorps regulations [45 CFR §§ 2522.700-740](#), all AmeriCorps State and National grantees that receive an average annual AmeriCorps competitive grant or formula funds of \$500,000 or more must conduct an independent evaluation. An independent evaluation uses an external evaluator who has no formal or personal relationship with, or stake in the administration, management, or finances of the grantee or of the program to be evaluated.

All other AmeriCorps State and National grantees who receive less than \$500,000 must conduct an internal evaluation. An internal evaluation is designed and conducted by qualified program staff or other stakeholders, such as board members, partners, or volunteer affiliates.

The \$500,000 threshold is based on the average annual funding the grantee receives from CNCS (the CNCS share only, not the program's total budget with matching funds) during the year prior to submitting your evaluation plan.

<b>If you are....</b>	<b>You will submit an....</b>
State formula program receiving an average annual AmeriCorps grant of \$500,000 or less	Internal Evaluation

State formula program receiving an average annual AmeriCorps grant of \$500,00 or more	Independent Evaluation
State competitive program with an average annual AmeriCorps grant of \$500,000 or more	Independent Evaluation

Below outlines the timeline and expectations of conducting an evaluation for formula programs regardless of the amount received.

<b>State Formula Programs Receiving An AmeriCorps Grant (Regardless of Amount)</b>	
<b>If you are applying for...</b>	<b>The following must be submitted with your application:</b>
Your <b>first</b> three-year formula grant	<p>You are required to submit a data collection plan as described in the “Data Collection Plans” section of the NOFO</p> <p>You are not required to submit an evaluation plan or conduct an evaluation during the three-year period.</p>
Your <b>second</b> three year formula grant	You must submit an evaluation plan for an evaluation that will be conducted during your <b>third</b> three-year formula grant
Your <b>third</b> three-year formula grant	You must submit an evaluation plan and are required to complete an evaluation described in the approved plan during the second three-year grant.
Your <b>fourth</b> three-year formula grant	You are required to submit: 1) a report detailing the results of the evaluation conducted during the third-year grant period; and 2) an evaluation plan for the fifth three-year grant period that will build on the results of the evaluation from the third three-year grant period
A formula AmeriCorps grant beyond your fourth three-year grant award	<p>You must continue to submit an evaluation plan for each successive three-year grant period and conduct an evaluation in the following three-year grant period so you are conducting an internal evaluation every six years.</p> <p>(e.g. fifth three-year grant – conduct evaluation plan, sixth three-year grant, conduct evaluation)</p>

Serve Idaho competitive programs are bound to the timeline and expectations of AmeriCorps as described in the AmeriCorps regulations [45 CFR §§ 2522.700-740](#). [Further information can also be found in the evaluation FAQ here or on the evaluation resources on Basecamp.](#)

## Design Type

[Serve Idaho Competitive Programs are bound to the Design Type requirements](#) of AmeriCorps as described in the AmeriCorps regulations [45 CFR §§ 2522.700-740](#)

Formula programs can use the chart below:

If you are a...	The following evaluation needs to be conducted
State formula program receiving an average annual AmeriCorps grant of \$500,000 or less	<p>Process, implementation, or impact evaluation.</p> <p>However, Serve Idaho <b><i>strongly</i></b> encourages grantees to build on outcome data collected through existing performance measurement efforts and implement a design that includes assessment of program outcomes and a study comparison group, which can help to determine whether outcomes can be attributed to the program.</p> <p>Programs are not required to conduct an experimental or quasi-experimental evaluation.</p>
State formula program receiving an average annual AmeriCorps grant of \$500,00 or more	<p>Impact evaluation.</p> <p>The evaluation should provide statistical evidence of how well a program works and what effect it has on service recipients and/or service participants compared to what would have happened in the absence of the program.</p> <p>Grantees are encouraged to use an experimental or quasi-experimental design but are not required.</p>



## **Additional Resources**

### **AmeriCorps Website:**

<http://www.nationalservice.gov/>

### **AmeriCorps National Service Knowledge Network:**

<http://www.nationalservice.gov/resources>

### **AmeriCorps Website:**

[www.americorps.gov](http://www.americorps.gov)

### **Serve Idaho Website:**

[www://serveidaho.gov/](http://www.serveidaho.gov/)

### **AmeriCorps Search Statutes, Regulations, Provisions and FAQs**

<http://www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grants>

### **Member Service Gear**

<https://gooddeed.org/americorps.aspx>

<https://americorps.nationalservicegear.org/store/catalog/americorps>

<http://www.companycasuals.com/careeruniforms/start.jsp> -Ph.208.342.8346

Toll Free 800.698.8346 Fax 208.342.9124

### **AmeriCorps Education Award Information**

<http://www.nationalservice.gov/programs/americorps/segal-americorps-education-award>

### **AmeriCorps Logos**

<http://www.nationalservice.gov/newsroom/marketing/logos/>

### **National Service Days Calendar**

<http://www.serveidaho.gov/Events/NationalDaysofService.aspx>

### **AmeriCorps Forms**

<http://www.nationalservice.gov/programs/americorps/current-members/forms>

### **CNCS Funding Opportunities**

[http://www.americorps.gov/for\\_organizations/funding/index.asp](http://www.americorps.gov/for_organizations/funding/index.asp)

### **Manage Current Grants**

<http://www.nationalservice.gov/build-your-capacity/grants/managing-americorps-grants>